



Tax and Business Services Career Path

A Flow Chart for Tax and Business Services and Management Growth Opportunities

→ *Developing Tax and Accounting Expertise*

→ *Developing Accounting and Management Expertise*

→ *Developing Marketing, Mentoring and Management Expertise*

Associate	Sr. Associate	Supervisor	Manager	Principal
<ol style="list-style-type: none"> 1. 100% Prepare basic tax returns and/or perform assigned accounting work on client engagements under close supervision 2. No marketing or managerial requirements 3. Sit for and pass CPA Exam 	<ol style="list-style-type: none"> 1. 100% Increasing complexity of returns and/or responsibility of accounting and financial statements. Some field work done under direction of supervisor 2. No marketing or managerial responsibilities. 3. Sit for and pass CPA Exam 	<ol style="list-style-type: none"> 1. 0 – 10% Supervises and/or trains Associate and Sr. Associate. Has team focus. 2. 40 – 80% Prepare complex returns. 3. 20 – 60% Perform initial review of staff prepared returns and/or technical review of work performed by staff on client engagements. 	<ol style="list-style-type: none"> 1. 5 – 10% Direct the work of Associates and Supervisors. Intentional staff development responsibilities. 2. 0 – 10% Prepare complex returns 3. 40 – 90% Technical review of all returns and staff performed work for accuracy, completeness, relevance and adherence to firm policies prior to submission to Principal. 4. 10 – 40% Develop client relationships and manage client engagements (scheduling, staffing, budgets, and fees.) 	<ol style="list-style-type: none"> 1. 50 – 60% Manage client relationships and develop new business 2. 20 – 30% Builds and markets for team/branch 3. 10 - 20 %Final review of tax returns and audit/accounting reports. 4. (Audit) Responsible for AICPA, FASB & SSARS compliance. 5. Target of \$600,000 in billings managed