Job Description

Tax Intern

Start Date: February 2018
Length of internship: Three months (estimated)
Location: Irvine, CA

If interested, please send resumes to:

Gabriel Retort
Manager – Executive Tax & Advisory
Pacific Dental Services
Email: retortg@pacden.com

The primary purpose and function of the Tax Intern is to assist in meeting owner-doctors tax filing and planning needs, and to assist PDS in attracting and retaining top owner-doctor talent. The Tax Intern also works to ensure timely tax reporting compliance and tax planning for PDS and applicable shareholders, and to minimize tax costs and department costs to the Company.

ESSENTIAL FUNCTIONS:
To perform this job successfully, an individual must be able to perform each essential function satisfactorily with or without accommodation. The requirements listed below are representative, but not all inclusive, of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

1. Maintain tax department data storage & retrieval system. This entails scanning and e-storage of necessary documents.
2. Monitor federal, state and local tax-related filing deadlines (income, property, sales & use and business license tax returns), to ensure timely compliance with tax reporting and payment requirements. Provide tax director with list of all tax returns due (and not yet filed) 10 days and 5 days before each deadline.
3. Prepare required excel worksheets for tax returns using the worksheets.
5. Learn basic tax treatment of partnerships, LLC’s, corporations, S-Corporations, tax-exempt organizations, and individuals (filing deadlines, annual and quarterly tax payment deadlines, means of filing extension requests, etc.) for each entity type.
6. Learn basic use of Lacerte and CCH Axcess tax software, and use it for filing extension requests, quarterly tax payments, etc. Make sure each new entity (with its relevant information) is input in Lacerte and CCH Axcess after it is formed. Maintain Lacerte and CCH Axcess software updates.
7. Make sure initial period tax payment is made for all new LLC’s, corporations, and S-Corporations; work with A/P to ensure timely payment of all other taxes due.
8. Oversee & monitor electronic filing of tax returns through Lacerte and CCH Axcess.

9. Provide reports & schedules as needed from General Ledger; Input fixed asset additions into Lacerte depreciation modules, including proper categorization of assets per G/L data.

10. Order tax dept. supplies as needed.

11. Maintain continuing education files for CPA's in department.

12. Prepare applications for resale licenses, secretary of state registration forms, etc. as needed for all new entities.

13. Prepare & maintain checklist of all tax returns, reports and registration requirements within each state and city where a practice is opened.

14. Prepare periodic sales & use tax returns, property tax returns, income tax returns and information returns (i.e. 1099's) as needed.

15. Assist with annual updates to Solomon / Lacerte bridge mapping, and download of related data to Lacerte software.

16. Ensure that partnership K-1 schedules are issued to owner-doctors by April 1 of each year; assist owner-doctors with related questions.

17. Ensure that all PDS shareholders have projected April 15 tax payment figures in order to file April 15 extension requests; ensure that all owner-doctors have enough data from PDS entities to enable them to file timely extension requests.

18. Maintain proficiency with respect to current tax laws, tax law changes, Lacerte tax software, Solomon accounting software, and CCH Tax Research service.

19. As each new entity is formed, input the entity and related information in Lacerte tax software and maintain log of compliance with property tax, sales & use tax and income tax reporting & payment requirements.

20. Prepare Cost Segregation Study reports for new practices throughout the year.

21. Assist with Preparation of annual federal and state tax returns for PDS, including creation of workpapers reconciling accounting records to tax returns, and creation of annual multi-state apportionment schedule.

22. Assist with preparation of real estate entity tax returns; provide real estate K-1s to investors by April 8.

23. Assist with preparation of professional corporation returns after April 15 (due Sept. 15).

24. Assist with preparation of non-profit foundation tax returns; initial due date May 15; extended due dates August 15 and November 15.

25. Prepare of quarterly estimated tax payments as requested.

26. Assist with year-end projections for PDS practices, parent company, real estate entities and shareholders, beginning in October.

27. At the beginning of each year, enter the data in the new Lacerte software package for the sales of partnership interests, practice spin-offs, and property sales / exchanges as soon as the new software becomes available.

28. Respond to federal, state and local tax inquiries and audit requests as needed.

29. Assist with tax-driven documentation related to aircraft use.

30. Bring forth ideas to improve processes and materials.
31. Maintain an appropriate professional appearance and demeanor in accordance with Company policy.

32. Ensure compliance with Company policies, as well as State, Federal and other regulatory bodies.

33. Print & provide tax organizer booklets to individuals early January; Rollover all clients to new version of CCH Axcess early January.

34. Other duties as assigned.

**REQUIRED:** Pursuing at minimum a Bachelor's degree with an emphasis in accounting.

**DESIRABLE:** Have completed or are currently enrolled in courses related to tax.

**CERTIFICATES/LICENSES/REGISTRATIONS:**
None required for this position.

**KNOWLEDGE/SKILLS/ABILITIES:**
- Strong sense of personal responsibility for tasks assigned.
- Ability to work with others & accept direction.
- Flexibility in adapting processes to meet unique needs.
- Ability to communicate effectively with owner-doctors and dental office teams.
- Ability to communicate effectively and present information, both verbally and in writing, to co-workers and government tax agencies.
- Ability to function effectively in Microsoft Excel & Outlook, and to learn Lacerte, Solomon and CCH.
- Organizational ability by demonstrating a systematic approach in carrying out assignments.
- Demonstrates a strong ability to identify, analyze, and solve problems.
- Detail oriented, organized, process focused, problem solver, self motivated proactive, customer service focused.
- Displays independent judgment by willingness to make timely and accurate decisions based on available information that is sometimes vague or limited in nature.
- Ability to multitask effectively and work in a fast paced and sometimes ambiguous environment, without compromising quality of work.
- Ability to prioritize tasks and projects with limited direction, while understanding and contributing to the success of the assigned region(s) and corporation.