

## Tax Team Expectations and Path\*

	<b>"In-Training" Tax Accountant</b>	<b>Tax Accountant</b>	<b>"In-Training" Tax Supervisor</b>	<b>Tax Supervisor</b>	<b>Senior Tax Supervisor</b>	<b>Tax Manager</b>	<b>Senior Tax Manager</b>	<b>Junior Partner</b>
Tax Prep	225	250	250	150	75	50	25	25
Tax Review**	0	0	0	100	150	300	450	600
Tax Delivery	0	0	0	50	150	150	100	100
Tax Signing	0	0	0	0	150	300	350	350
Prep / <b>Review</b> Blend	100% / 0%	100% / 0%	100% / 0%	60% / 40%	33% / 67%	10% / 90%	5% / 95%	5% / 95%
Total "touch"	225	250	250	250	225	350	475	625
Tax Plans Prep	75	75	75	75	50	50	50	50
Tax Plans Review, Delivery	0	0	0	0	150	200	200	200
Optional								
Committees / Subteams	?	?	?	?	?	?	?	
Managed BAS Engagements	0	0	0	50	75	100	150	175
Managed TO Engagements	0	0	0	50	125	200	300	350
Managed Revenue	0	0	0	283,000	482,000	680,000	1,020,000	1,190,000
Promotion	1 WCG tax season, 1 WCG plan season, 6-8 months	3 tax seasons total, plus discretion	1 WCG tax season, 1 WCG plan season, 6-8 months	4 tax seasons total, plus discretion	discretion	discretion	discretion	

**In-Training Means New to the Tax Team**

**In-Training Tax Manager is Very Rare**

\*All annual work plans and associated goals are customized with each team member.

\*\* Tax Manager and Partner reviews vary from full reviews to light duty reviews to signer probation reviews.

### Examples-

Tax Supervisor on the business development committee talking to prospects 50% of the time would then prep 75 returns, review 50 returns, prep 40ish plans.

Tax Supervisor on the templates and tax strategy committees making up 25% of their time would then prep 110ish returns, review 75ish returns, prep 60ish plans.

Tax Manager on the training committee making up 50% of their time would then prep 25 returns, review 150 returns, prep 25 plans and review 100 plans.