

T-SOA, Certified Public Accounting Services

A Commitment To Serve – We Are Tax Professionals For The People



Serving the Communities of:

Hawaii

525 Cummins Street
Honolulu, HI 96814

Nevada

P.O. Box 236077
Honolulu, HI 96823-3520

New Mexico

609 E Lincoln St
Las Vegas, NM 87701

Junior Sales & Strategic Tax Data Specialist Job Posting

Job Title: Junior Sales & Strategic Tax Data Specialist

Job Summary: Join our dynamic team at T-SOA Certified Public Accounting Services as a Junior Sales & Strategic Tax Data Specialist. This entry-level position combines innovative tax data processing with community engagement to deliver exceptional service and promote our mission of Transparency, Service, Optimization, and Aloha. We are looking for individuals who are eager to learn, adaptable, and driven by a commitment to excellence.

Key Responsibilities:*Strategic Tax Data Processing*

- Collaborate in a team environment to prepare tax returns using a structured, step-by-step process.
- Assist with data collection by guiding clients through documentation requirements aligned with our transparent pricing structure.
- Input client data into tax preparation software with accuracy and attention to detail.
- Review entered data for completeness and flag inconsistencies for follow-up.
- Support the preparation of summary documents for client review and finalization.
- Assist in organizing and maintaining secure client records.

Sales & Marketing

- Participate in community outreach initiatives, including flyer distribution and promoting services at workshops and public events.
 - Answer general client questions about services based on provided training.
 - Support workshop events by assisting with registration, setup, and client interaction.
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Qualifications:

- Completion of foundational accounting coursework (e.g., AC 201 and AC 202 or equivalent) preferred.
- Basic proficiency in Microsoft Excel and familiarity with Word and other office tools.
- Strong oral and written communication skills.
- Willingness to learn and adapt to innovative tax preparation methods and marketing strategies.
- Ethical and professional behavior in handling sensitive client data.
- Ability to work in a team setting and maintain a positive, client-focused attitude.

Compensation:

- Training period compensation: \$15 per hour.
- Regular pay rate: \$17.50–\$21.50 per hour, based on experience and performance.
- Seasonal, part-time position with potential for promotion to permanent full-time based on organizational and individual performance.

Why Join Us? At T-SOA, we operate on a foundation of aloha and family-based values, inspired by the Hawaii Revised Statutes § 5-7.5 and the AICPA Code of Professional Conduct. We prioritize teamwork, client care, and continual improvement in efficiency and service excellence. This role provides:

- Extensive training in innovative tax preparation methods and marketing.
- Opportunities to develop skills in bookkeeping, financial planning, and client relations.
- A supportive environment with pathways for career advancement based on performance.

How to Apply: Submit your resume to hr@tsoa-cpas.com, including a list of software you have experience with (e.g., Microsoft Excel, QuickBooks, Xero, Drake, UltraTax). Selected candidates will complete:

- An Excel proficiency test.
- A customer communication scenario test.
- A critical thinking and math evaluation.

Recruitment Schedule

Applications for the Junior Sales & Strategic Tax Data Specialist position will be accepted from:

- **Opening Date:** January 20, 2025
- **Closing Date:** February 25, 2025

Interviews will be conducted on a rolling basis, and the position will remain open until February 15 or until the ideal candidate is hired. Early applications are highly encouraged.