

## **Two job openings in Lafayette, California**

- Transaction associate (1031 exchanges)
- Tax preparer/reviewer

Each position is described below.

### **Your Next Move**

If you are interested in any position with our company, send a brief letter with your resume explaining why you are the right candidate.

Send to tax@goscott.com.

Principals only. Employment agencies and recruiters: please don't contact our company.

G. Scott Haislet  
3445 Mt. Diablo Blvd.  
Lafayette, California 94549  
Office phone (925) 283-1031  
Facsimile (925) 283-3850  
tax@goscott.com

We do business as Mission Exchange Inc. as 1031 exchange qualified intermediary.

Our company is an equal opportunity employer.

### **Transaction Associate (1031 exchanges)**

Associate will provide overall support in our 1031 exchange department.

The right candidate possesses passion for client service, teamwork, and problem-solving and enjoys working with friendly people who hate office politics.

#### **Responsibilities:**

- Preparing legal forms from templates for 1031 exchanges
- Gather detailed information and respond to customer and third party inquiries
- Monitor transactions and ensure compliance with legal requirements
- Record and store client information

#### **Qualifications:**

- Experience as a title company escrow administrator, legal assistant, legal secretary, or paralegal
- Familiarity with real estate, escrows, loans, or tax a plus
- Ability to prioritize and multitask
- Excellent written and verbal communication skills
- Deadline and detail-oriented
- You may fit even though you don't know what "1031 exchange" means

Compensation and Benefits:

- Hourly compensation – from \$25 per hour, depends on experience
- Paid time off
- Health insurance
- Flexible schedule; we seek full-time, but will consider part-time
- Casual attire

**Tax Preparer/Reviewer**

The right candidate possesses passion for tax practice and client service.

The right candidate will have opportunity to grow immensely, as mentee of one of California's leading tax practitioners. We have terrific clients, interesting projects, and a large referral basis.

Responsibilities:

- Prepare individual, corporation, partnership, fiduciary, gift, and estate tax returns
- Perform tax projections and other special analyses
- Help clients in IRS audits and appeals
- Assist clients closing their books (e.g., YE journal entries toward accurate balance sheet and income statement)
- Perform special projects that arise from time to time

#### Qualifications:

- California CPA or IRS enrolled agent
- Hands-on recent tax preparation experience for 1040, corporations, LLCs, estates, and trusts
- Recent hands-on experience with debits and credits
- Recent hands-on experience with QuickBooks
- Proficiency in MS Office (word, outlook, excel, etc.)
- Proficiency in Lacerte or similar tax prep software (e.g., prosystems)
- Tax research skills are a plus, but not necessary.
- Advanced degree is a plus, but not necessary.
- Financial statement audit, review, or compilation experience is a plus, but not necessary.
- Good grades in college, particularly in accounting, finance, and tax courses, are definitely a plus.

#### Compensation and Benefits:

- Hourly compensation – from \$35 per hour, depends on experience
- Paid time off
- Health insurance
- Flexible schedule; we seek full-time, but will consider part-time or seasonal
- Casual attire

#### Other Information Regarding Tax Practice:

- Tax season runs from February 15 to April 15 with additional "bulge" periods in September and October. We try to stay under 50 hours per week per person during tax season.
- We don't do bookkeeping or provide write-up services.
- We don't do financial statement audits, reviews, or compilations.

- We don't do property tax returns, payroll taxes, or sales taxes.
- All work will be performed at the company's office. No telecommuting, remote workers, no taking work home, etc.

### About the Company

Our company is a boutique for 1031 exchanges, tax and legal services, in Lafayette for over 20 years. The owner is a leading tax practitioner, CPA, and tax attorney, with over 30 years' experience in tax, real estate, and financial consulting. In addition to the activities in which the candidate may be directly involved, the company provides the following services:

- 1031 exchanges
- Estate planning, including wills, revocable trusts, and related work
- Probate legal representation
- Post-mortem trust administration
- Real estate and business transactions, such as purchase, sale, and financing
- LLC and corporation formation, reorganization, dissolution
- CPA continuing education courses in 1031 exchanges and real estate taxation generally

As time, interest, and acumen permit, and with the consent of all, any company employee may become involved in one or more of these areas.

Most importantly, our company takes "fit" very seriously. We like our small, nimble size. We have a flat organization chart. We operate as a team. With the proper nurture and training, our company desires each of our employees to perform with a high degree of autonomy. We make quick decisions, and we hate staff meetings. We try to resolve issues quickly before they get out of hand, and avoid office politics like the plague.

We dress casually, typically "golf attire" including Bermuda shorts in the warmer weather, and we hate long commutes to San Francisco or Silicon Valley.

Our clients love us, and we take time to make sure the fit is correct for the client and our office (we will terminate a client relationship that goes sour).

We offer flex-time and a relaxed, friendly office environment. We offer encouragement rather than ridicule. We don't mind mistakes that don't repeat themselves.