

**Employee:**

**STATUS:** Non-Exempt

**REPORTS TO:** Manager, Tax Research Services

**DATE:** January 2019

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***Position Summary***

Research tax-related questions from members and non-members using a variety of sources, while providing appropriate, quality responses and solutions to customers.

***Principal Duties and Responsibilities:***

1. Research federal tax-related questions from members and non-members.
2. Provide quality answers to the questions, either in written or verbal form.
3. Enter customer information into database for billing, marketing, and performance tracking.
4. Assist in technical proofing of publications and textbooks.
5. Remain current in tax knowledge by reading tax updates and attending tax seminars and workshops.

***Additional Duties and Responsibilities:***

1. Other duties as necessary to fulfill the responsibilities of this position and the overall betterment of the organization.
2. Assist in updating research library and website, as necessary.

***Working Relationships and Scope:***

Reports to the Director of Tax Research and Government Relations. Works primarily with Association members and non-members to resolve tax-related questions. Works with other team members to ensure that members receive the most accurate response possible. Assist in providing coverage and assistance to other team members. Works with education and member services to satisfy customer needs. Must be professional in demeanor.

***Performance Dimensions:***

Quality, accuracy, timeliness, and thoroughness of work performed, adherence to phone schedule; ability to communicate effectively and develop good working relationships with others; responsiveness to the information needs of managers and co-workers; soundness of research decisions made.

***Knowledge, Skills and Abilities:***

Knowledge of tax code, regulations, theory, and practice applicable to all areas of federal tax law.

Ability to understand and interpret tax and regulation language. Ability to listen to customers, determine their needs, and apply tax law to their situation. Ability to use a variety of technical tools to research answers, including Internal Revenue Code, Regulations, CCH, RIA, PPC, and Tax Court cases. Ability to accurately write tax-related material in an understandable and readable format. Ability to proofread material prepared by other technical writers for technical accuracy.

Possess a high degree of skill in oral and written communication. Must be skilled at using computer software, such as Microsoft Word, spreadsheets, and databases. Also, must be skilled at using fax machines, copy machines, and the Internet. Good telephone skills are a must.

**NATP Values and Core Competencies**

Integrity	Collaboration	Objectivity
Open-mindedness	Mutual Respect	Innovation
Fiscal Responsibility	Fun	Community
Honesty	Member Focus	Accountability

NATP aspires to, and consciously works towards, building a healthy organizational culture. While not all encompassing, the values listed above shape and influence all our decisions and actions and exemplify the type of conduct expected of all staff members. These values are considered core competencies, and as they are performed by employees will contribute directly to our goal of excellence in practice. As with any other job responsibilities outlined in this document, you are expected to respect, promote, and demonstrate these values in the performance of your job. All employees are accountable for adhering to our mission, vision, and values while performing the essential duties and responsibilities of their job.

**Working Conditions:**

Work is performed in an office environment with minimal exposure to injury. In-coming calls are received via an automated call-distribution system. Tax questions are also received via fax and e-mail. Work hours are normally Monday through Friday and will usually average 40 hours a week. Extended evening and weekend work may occur during the tax filing season.

**Acknowledgement:**

This job description describes the general nature and level of work performed by the employee assigned to this position. It does not state or imply that these are the only duties and responsibilities assigned to the job. The employee may be required to perform other job-related duties as requested by the Director of Research or Management Team. All requirements are subject to change over time and to possible modification to reasonably accommodate individuals with a disability.

I acknowledge that this job description is neither an employment contract nor a legal document. I have received, read, and understand the expectations for the successful performance of this job. NATP employees are required to adhere to the NATP values in all their interactions with members, vendors, and fellow employees. As an employee, I will strive to embrace the values and uphold the mission and vision of the organization.

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Employee Signature

Date