

Tax Team Expectations and Path*

| | "In-Training" Tax Accountant | Tax Accountant | "In-Training" Tax Supervisor | Tax Supervisor | Senior Tax Supervisor | Tax Manager | Senior Tax Manager | Partner |
|----------------------------|--|---|--|--|----------------------------------|--------------------|-------------------------------|----------------|
| Tax Prep | 250 | 300 | 250 | 150 | 100 | 50 | 25 | 25 |
| Tax Review | 0 | 0 | 0 | 150 | 350 | 400 | 450 | 500 |
| Tax Delivery | 0 | 0 | 0 | 50 | 150 | 400 | 450 | 500 |
| Tax Signing | 0 | 0 | 0 | 0 | 150 | 400 | 450 | 500 |
| Prep / Review Blend | 100% / 0% | 100% / 0% | 100% / 0% | 50% / 50% | 25% / 75% | 10% / 90% | 5% / 95% | 5% / 95% |
| Total "touch" | 250 | 300 | 250 | 300 | 450 | 450 | 475 | 525 |
| Tax Plans Prep | 100 | 150 | 150 | 150 | 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 | 25 | 50 | 100 | 150 | 175 |
| Managed TO Engagements | 0 | 0 | 0 | 25 | 100 | 200 | 300 | 350 |
| Managed Revenue | 0 | 0 | 0 | 137,000 | 331,000 | 662,000 | 993,000 | 1,159,000 |
| Promotion | 1 WCG tax season, 1 WCG plan season, plus discretion | 3 tax seasons total, plus discretion | 3 tax seasons total, 1 WCG tax season, 1 WCG plan season | 3 tax seasons total, 1 WCG tax season, 1 WCG plan season, 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.

Examples-

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

Tax Supervisor on the templates and tax strategy committees making up 25% of their time would then prep 100ish returns, review 100ish returns, prep 100ish plans.

Tax Manager on the training committee making up 50% of their time would then prep 25ish returns, review 200ish returns, skip plan prep and review 100 plans.