Revenue

PASS THROUGH ENTITY BOOKS & RECORDS AUDITOR

This entry level position will join a team of 10 to 14 revenue auditors that perform full-scope books and records audits on pass through entity tax returns and credit claims, including the audit of items that may flow through to individuals from pass through entities such as tax-option (S) corporations, partnerships, and trusts. You will learn the functions associated with field auditing, Wisconsin individual income and pass through entity laws, audit techniques, and effective approaches to interacting with taxpayers. After the initial training period, auditors will work independently to complete audits. Audits are generally conducted at taxpayer or accounting offices.

Activities include:
- examining individual income and fiduciary (trust and estate) income tax returns, partnership returns, LLCs, tax option (S) corporation returns, credit claims, and any other necessary returns for proper application of Wisconsin laws
- examining books and records of multiple years or periods for proper application of the Internal Revenue Code and Wisconsin income and franchise tax laws to accurately determine the tax liability
- receiving additional information from taxpayers when needed
- documenting your work using working papers and reports
- handling appeals and taxpayer contacts
- providing taxpayer assistance and education
- assisting with tax program updates and improvements
- participating in special projects and assignments, including quality improvement and ongoing training and development

To perform these activities effectively, books and records auditors will:
- effectively communicate, both written and verbally
- perform extensive research
- write technical documents
- attain technical knowledge related to audits
- know and understand policies and procedures to complete audit projects
- prioritize tasks, remain organized, and manage time effectively
- perform special assignments such as preparation or presentation of training seminars or participation on project teams that may cross section/bureau lines