



PASS THROUGH ENTITY BOOKS & RECORDS AUDITOR

This entry level position will join a team of 4 to 5 revenue auditors that perform 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 auditing, Wisconsin individual income and pass through entity laws, audit techniques, and effective approaches to interacting with taxpayers. In your work as an auditor, you will conduct a thorough review of books and records to accurately determine the correct tax liability. You will document your work using working papers and reports. You will have the opportunity to contribute your ideas for improvements in auditing procedures and the development of new approaches. The ability to prioritize tasks, remain organized, and manage your time effectively is key.

- examination of 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
- examination of books and records of multiple years or periods for proper application of the Internal Revenue Code and Wisconsin income and franchise tax laws
- acquisition of additional information from taxpayers when needed
- documenting your work using working papers and reports
- handling of appeals and taxpayer contacts
- taxpayer assistance and education
- assistance with tax program updates and improvements
- participation 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, with taxpayers
- perform extensive research
- write technical documents
- attain technical knowledge related to audits
- know and understand policies and procedures to complete audit projects
- perform special assignments such as preparation or presentation of training seminars or participation on project teams that may cross section/bureau lines