

Income Tax Preparer Interview Questions

1. Share an example of a time you had to gather information from multiple sources. How did you determine which information was relevant?

2. Share an experience when you applied new technology or information in your job. How did it help your company?

3. What kind of experience do you have preparing or assisting in preparing simple to complex tax returns for individuals or small businesses?

4. Describe methods you have found effective to review financial records such as income statements and documentation of expenditures to determine forms needed to prepare tax returns.

5. Share an experience you had in dealing with a difficult person and how you handled the situation.

6. Would you consider analyzing data or information a strength? How so?

7. Share your approach to compute taxes owed or overpaid, using adding machines or personal computers, and complete entries on forms, following tax form instructions and tax tables.

8. Provide an example when your ethics were tested.

9. Share an experience in which your attention to detail and thoroughness had an impact on your last company.

10. Share an example when you interviewed clients to obtain additional information on taxable income and deductible expenses and allowances.

11. Provide an example of a time when you were able to demonstrate excellent listening skills. What was the situation and outcome?

12. Share an example of when you went above and beyond the "call of duty". (Look for answers that show the candidate is dependable.)

13. Name a time when your patience was tested. How did you keep your emotions in check?

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14. Tell me about the last time when you consulted tax law handbooks or bulletins to determine procedures for preparation of atypical returns. What did you learn?

15. Tell me about an experience in which you analyzed information and evaluated results to choose the best solution to a problem.

16. Provide a time when you dealt calmly and effectively with a high-stress situation.

17. What is the most challenging part of calculating form preparation fees according to return complexity and processing time required?

18. Describe an experience when you checked data input or verify totals on forms prepared by others to detect errors in arithmetic, data entry, or procedures.

19. How do you balance cooperation with others and independent thinking? Share an example. (Try to determine if the candidate has a cooperative attitude or is otherwise good-natured.)

20. Share a time when you willingly took on additional responsibilities or challenges. How did you successfully meet all of the demands of these responsibilities? (Make sure the candidate is a self-starter and can demonstrate some initiative.)

21. Tell me about a time when you developed your own way of doing things or were self-motivated to finish an important task.

22. Provide an example of when you were persistent in the face of obstacles.

23. Tell me how you organize, plan, and prioritize your work.

24. Provide a time when you worked in a rapidly evolving workplace. How did you deal with the change? (Make sure the candidate is flexible.)

25. Share an example of when you established and accomplished a goal that was personally challenging. What helped you succeed?

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26. Provide an experience in which you were sensitive to someone's needs or feelings. How did your helpfulness affect your work environment?

27. Provide a time when you were able to identify a complex problem, evaluate the options, and implement a solution. How did the solution benefit your employer?

28. Share an experience in which your willingness to lead or offer an opinion helped your company.

29. Share an experience in which personal connections to coworkers or others helped you to be successful in your work. (Make sure candidate works well with others.)

30. Name a time when your creativity or alternative thinking solved a problem in your workplace.