ACCOUNTING INTERNSHIP EXPO

Clayton Bodnar - Tax Intern @ Herbein

- Scan in workpapers
- Prepare tax organizer
- Prepare tax returns

XCM Dashboard

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• Fix review points

• Miscellaneous tasks

<u>Workflow</u>

• Acess to all programs

Favorites 🔹 🍾 Add Files 😝 Add Hyperlinks 🖄 Advanced Search

• Only used certain ones for internship

<u>Document</u>

- For tasks to be assigned and moved
 - Connects firm wide
- Unassigned pool returns

<u>Return Manager</u>

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- Where client tax files are located
 - 1040 Support
 - Workpapers
 - Correspondence

- Bit Year
 Diet D
 Name
 Name
 - Lookup client returns
 - Rollforward the returns
 - Prepare the returns

Lessons Learned

- How to use programs listed
- How to scan in workpapers
 - How to input K-1s
- How to keep a task list and schedule
 - Overall efficiency
- How to address different situations in

returns

