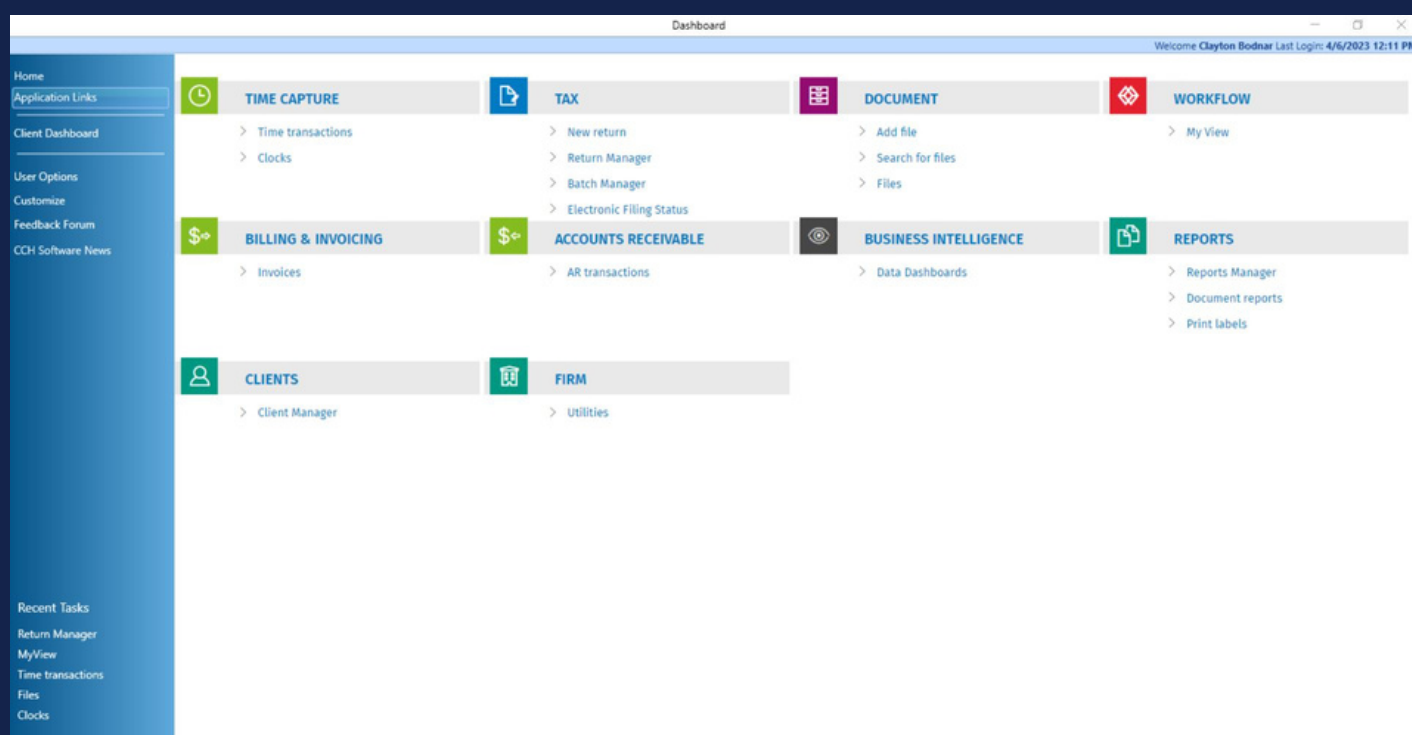


# ACCOUNTING INTERNSHIP EXPO

## Clayton Bodnar - Tax Intern @ Herbein

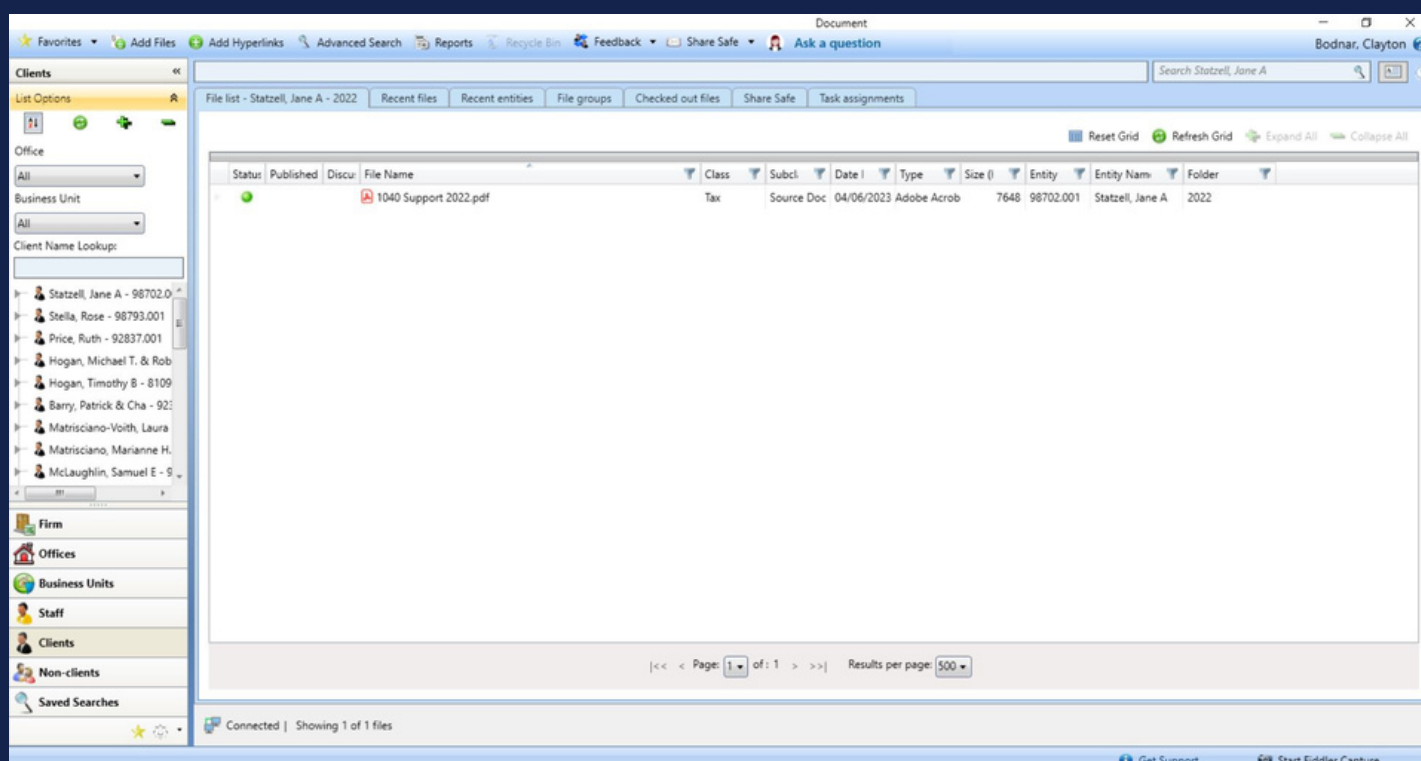
- Scan in workpapers
- Prepare tax organizer
- Prepare tax returns
- Fix review points
- Miscellaneous tasks

### XCM Dashboard



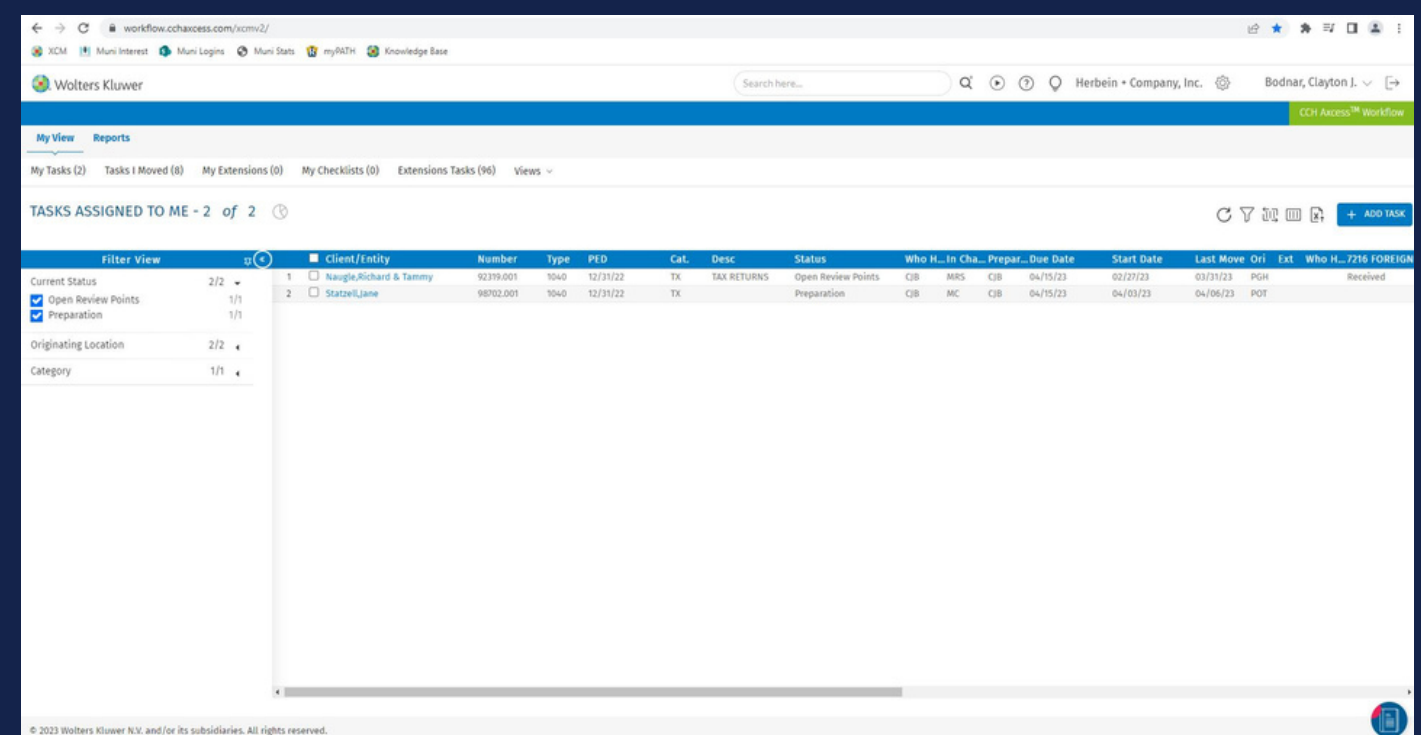
- Access to all programs
- Only used certain ones for internship

### Document



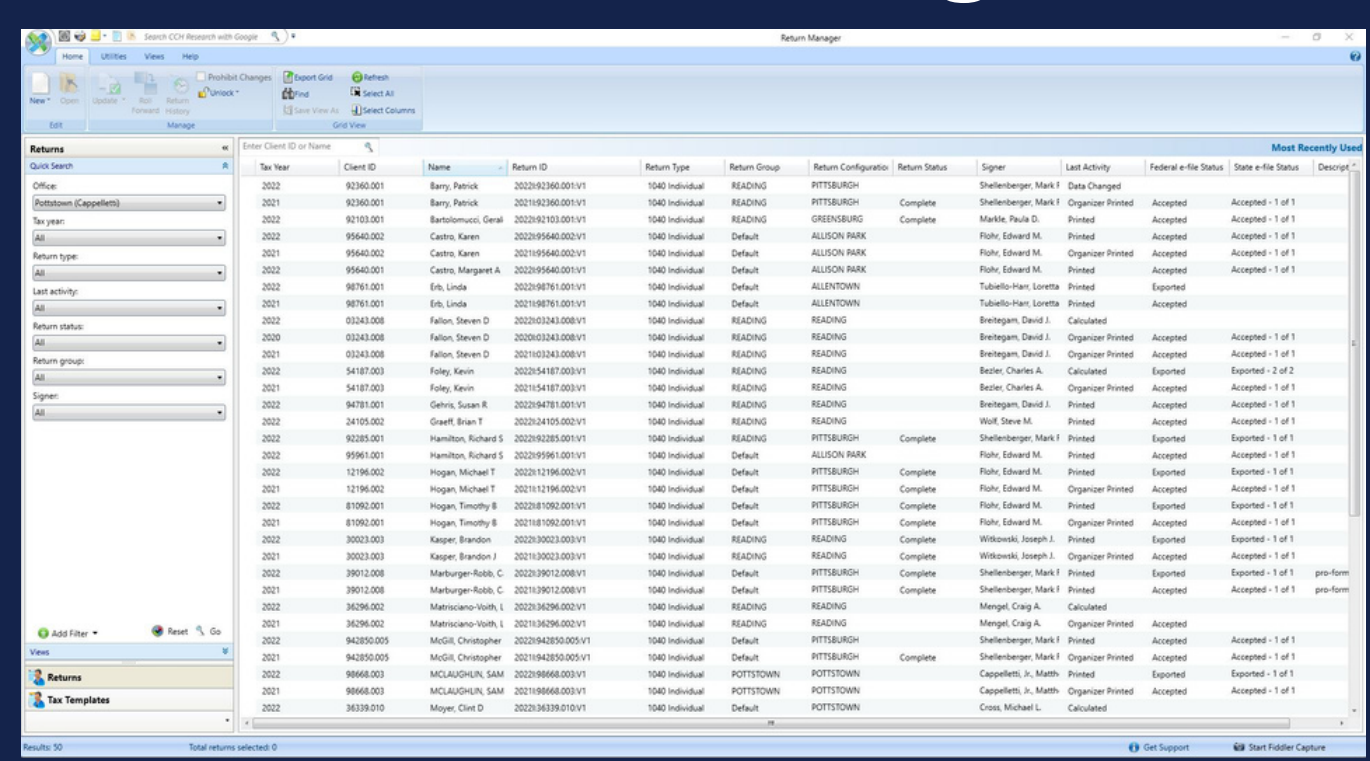
- Where client tax files are located
  - 1040 Support
  - Workpapers
  - Correspondence

### Workflow



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

### Return Manager



- 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