

Tax Preparer Occupations Labor Market Information Report Chabot College

Prepared by the San Francisco Bay Center of Excellence
for Labor Market Research
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Recommendation

Based on all available data, there appears to be an undersupply of Tax Preparer workers compared to the demand for this cluster of occupations in the Bay region and in the East Bay sub-region (Alameda and Contra Costa Counties). There is a projected annual gap of about 480 students in the Bay region and 110 students in the East Bay Sub-Region.

Introduction

This report also provides student outcomes data on employment and earnings for TOP 0502.10-Tax Studies programs in the state and region. It is recommended that these data be reviewed to better understand how outcomes for students taking courses on this TOP code compare to potentially similar programs at colleges in the state and region, as well as to outcomes across all CTE programs at Chabot College and in the region.

This report profiles Tax Preparer Occupations in the 12 county Bay region and in the East Bay sub-region for a proposed new program at Chabot College.

- **Tax Preparers (13-2082):** Prepare tax returns for individuals or small businesses.
Entry-Level Educational Requirement: High school diploma or equivalent
Training Requirement: Moderate-term on-the-job training
Percentage of Community College Award Holders or Some Postsecondary Coursework: 31%

Occupational Demand

Table 1. Employment Outlook for Tax Preparer Occupations in Bay Region

Occupation	2019 Jobs	2024 Jobs	5-Yr Change	5-Yr % Change	5-Yr Openings	Average Annual Openings	25% Hourly Wage	Median Hourly Wage
Tax Preparers	3,656	3,893	237	6%	2,418	484	\$18.35	\$30.56

Source: EMSI 2020.3

Bay Region includes Alameda, Contra Costa, Marin, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano and Sonoma Counties

Table 2. Employment Outlook for Tax Preparer Occupations in East Bay Sub-Region

Occupation	2019 Jobs	2024 Jobs	5-Yr Change	5-Yr % Change	5-Yr Openings	Average Annual Openings	25% Hourly Wage	Median Hourly Wage
Tax Preparers	791	867	76	10%	548	110	\$14.84	\$27.40

Source: EMSI 2020.3

East Bay Sub-Region includes Alameda and Contra Costa Counties

Job Postings in Bay Region and East Bay Sub-Region

Table 3. Number of Job Postings by Occupation for latest 12 months (October 2019 - September 2020)

Occupation	Bay Region	East Bay Sub-Region
Tax Preparers	1,063	361

Source: Burning Glass

**Table 4a. Top Job Titles for Tax Preparer Occupations for latest 12 months (October 2019 - September 2020)
Bay Region**

Common Title	Bay	Common Title	Bay
Tax Preparer	255	Senior Tax Preparer	7
Tax Professional	213	Bookkeeper/Tax Preparer	7
First Tax Professional	173	Tax Professional Virtual	5
Preseason Tax Professional	61	Pre-Season Tax Professional	5
Seasonal Tax Preparer	40	Income Tax Preparer	5
Tax Preparer Seasonal	23	Tax Professional/Enrolled Agent	4
Tax Preparer Listing At Half In	14	Tax Professional II	4
Tax CPA Path To Become Advisor	14	Tax Preparer And/Or Reviewer	4
Bilingual Tax Professional - CPA - Remote	14	Tax CPA - Path To Become Advisor	4
Tax Preparer/Bookkeeper	11	Senior Auditor/Tax Preparer	4
Preparador De Cocina	11	Preparador De Alimentos	4
Tax Assistant	10	Acquisition Tax Professional	4
Tax Preparer Listing At Accountemps In	8	Tax Senior - Tax Technology & Transformation	3
Bilingual Tax Professional - CPA - Remote In	8	Tax Preparer - Seasonal	3

**Table 4b. Top Job Titles for Tax Preparer Occupations for latest 12 months (October 2019 - September 2020)
East Bay Sub-Region**

Common Title	East Bay	Common Title	East Bay
Tax Professional	83	Tax Professional Virtual	2
First Tax Professional	79	Tax Professional II	2
Tax Preparer	77	Tax Preparer/Reviewer	2
Preseason Tax Professional	21	Tax CPA Path To Become Advisor Listing At Half In	2
Seasonal Tax Preparer	19	Bilingual Tax Professional - CPA - Remote In	2
Tax Preparer Seasonal	8	Traveling Tax Preparer - Ctec Or Ea	1
Tax Cpa Path To Become Advisor	7	Tax Preparer/Enrolled Agent/Ctec	1
Tax Preparer/Bookkeeper	4	Tax Preparer/Enrolled Agent For The Tax Season	1
Senior Auditor/Tax Preparer	4	Tax Preparer/Enrolled Agent	1
Bilingual Tax Professional - CPA - Remote	4	Tax Preparer-Individual Tax Returns	1
Tax Preparer Listing At Half In	3	Tax Preparer-Ea/CPA/Ctec	1
Tax CPA - Path To Become Advisor	3	Tax Preparer-Ctec/Ea/CPA	1
Income Tax Preparer	3	Tax Preparer, Bilingual A	1
Bookkeeper/Tax Preparer	3	Tax Preparer Round	1

Source: Burning Glass

Industry Concentration

Table 5. Industries hiring Tax Preparer Workers in Bay Region

Industry – 6 Digit NAICS (No. American Industry Classification) Codes	Jobs in Industry (2019)	Jobs in Industry (2024)	% Change (2019-24)	% Occupation Group in Industry (2019)
Offices of Certified Public Accountants	1,440	1,534	7%	39%
Other Accounting Services	1,249	1,279	2%	34%
Tax Preparation Services	494	519	5%	13%
Payroll Services	366	364	-1%	10%

Source: EMSI 2020.3

Table 6. Top Employers Posting Tax Preparer Occupations in Bay Region and East Bay Sub-Region (October 2019 - September 2020)

Employer	Bay	Employer	Bay	Employer	East Bay
H&R Block	451	Ram Accountancy Services	2	H&R Block	186
Jackson Hewitt Tax Service	53	Neeka Corporation	2	Jackson Hewitt Tax Service	27
Intuit	50	Mckinney Company	2	Intuit	11
Block Advisors	5	Maxval Cpa	2	Tax Care	3
Tacos Ameca 1 Inc	4	Lindi Tax Service	2	Mckinney Company	2
Slater Associates	4	Liberty Tax	2	Hr Options	2
Shea Labagh Dobberstein	4	Irvin Abrahamson Company	2	Clarity Tax Service	2
Tax Care	3	Integrated Wealth Management Group	2	Bonnie Buhnerkempe	2
Smith Company	3	Hr Options	2	AI Financial Services	2
Perrin Tax And Accounting Services, Inc	3	Fitzpatrick & Tucker	2	Unity Council	1
Integrated Wealth Management Group/Potentia	3	Emeryville Tax Services	2	United Tax	1
Ernst & Young	3	Eckhoff And Company & Eckhoff Wealth Mang.	2	Total Business Care LLC	1
Eckhoff And Company	3	Dragon Tax & Accounting Services	2	Taxden Inc	1
Taxsquad	2	CPA Firm Specializing In Tax	2	Taxchampion Inc	1
Softcom Systems Incorporated	2	Clarity Tax Service	2	Tax Services	1
San Francisco	2	Bonnie Buhnerkempe	2	Tax Service	1
Records In Order	2	Bba Tax Inc	2	Strand Boyce O'shaughnessy, Cpas, Inc	1

Source: Burning Glass

Educational Supply

There is one (1) community college in the Bay Region issuing four (4) awards on average annually (last 3 years ending 2018-19) on TOP 0502.10-Tax Studies. There are no colleges in the East Bay Sub-Region issuing awards on average annually (last 3 years) on this TOP code.

Table 7. Awards on TOP 0502.10-Tax Studies in Bay Region

College	Sub-Region	Associates	Certificate Low	Total
De Anza	Silicon Valley	2	1	4
Total Bay Region		2	1	4
Total East Bay Sub-Region		0	0	0

Source: Data Mart

Note: The annual average for awards is 2016-17 to 2018-19.

Gap Analysis

Based on the data included in this report, there is a labor market gap in the Bay region with 484 annual openings for the Tax Preparer occupational cluster and 4 annual (3-year average) awards for an annual undersupply of 480 students. In the East Bay Sub-Region, there is also a gap with 110 annual openings and no annual (3-year average) awards for an annual undersupply of 110 students.

Student Outcomes

Table 8. Four Employment Outcomes Metrics for Students Who Took Courses on TOP 0502.10-Tax Studies

2017-18	Bay All CTE Programs	Chabot College All CTE Programs	State 0502.10	Bay 0502.10	East Bay 0502.10	Chabot College 0502.10
% Employed Four Quarters After Exit	67%	63%	66%	66%	60%	59%
Median Quarterly Earnings Two Quarters After Exit	\$11,466	\$1,332	\$11,275	\$14,016	\$14,877	\$11,903
Median % Change in Earnings	31%	28%	22%	37%	61%	23%
% of Students Earning a Living Wage	53%	47%	64%	55%	65%	67%

Source: Launchboard Pipeline (version available on (9/30/20))

Skills, Certifications and Education

Table 9. Top Skills for Tax Preparer Occupations in Bay Region (October 2019 - September 2020)

Skill	Postings	Skill	Postings	Skill	Postings
Tax Preparation	803	Spreadsheets	95	Adding Machine	35
Tax Returns	781	Tax and Financial Document Review	94	Calculation	33
Customer Retention	390	Customer Contact	87	Tax Compliance	33
Accounting	377	Federal Tax Returns	81	Circular 230	31
Tax Planning	280	Public Accounting	76	Wealth Management	30
Customer Service	203	Retail Industry Knowledge	68	Tax Research	26
Tax Software	203	Sales	58	Partnership Tax Returns	24
Bookkeeping	192	Prospective Clients	53	Generally Accepted Accounting Principles (GAAP)	23
Audit Planning	180	Articulating Value Propositions	52	Audit Experience	22
Appointment Setting	140	Brand Awareness Generation	52	CPA Firm Experience	21
Tax Law	139	Lifting Ability	52	Account Reconciliation	18
Data Entry	118	Product Sales	52	Tax Accounting	17
Quickbooks	117	Individual Tax Returns	47	Accounting Software	15
Scheduling	103	Financial Statements	43	Staff Management	14
Electronic Data Interchange	100	Client Base Retention	39	General Ledger	13

Source: Burning Glass

Table 10. Certifications for Tax Preparer Occupations in Bay Region (October 2019 - September 2020)

Note: 62% of records have been excluded because they do not include a certification. As a result, the chart below may not be representative of the full sample.

Certification	Postings	Certification	Postings
Certified Public Accountant (CPA)	370	Taxation Certification	2
Tax Preparation Certificate	28	Registered Tax Return Preparer (RTRP)	2
ServSafe	11	Commission License	2
Certified Tax Professional	6	Driver's License	1
Financial Accounting Standards Board (FASB)	4	Certified Treasury Professional (CTP)	1

Business License	3	CA License	1
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Source: Burning Glass

Table 11. Education Requirements for Tax Preparer Occupations in Bay Region

Note: 50% of records have been excluded because they do not include a degree level. As a result, the chart below may not be representative of the full sample.

Education (minimum advertised)	Latest 12 Mos. Postings	Percent 12 Mos. Postings
High school or vocational training	326	61%
Associate Degree	11	2%
Bachelor's Degree or Higher	194	37%

Source: Burning Glass

Methodology

Occupations for this report were identified by use of skills listed in O*Net descriptions and job descriptions in Burning Glass. Labor demand data is sourced from Economic Modeling Specialists International (EMSI) occupation data and Burning Glass job postings data. Educational supply and student outcomes data is retrieved from multiple sources, including CTE Launchboard and CCCCCO Data Mart.

Sources

- O*Net Online
- Labor Insight/Jobs (Burning Glass)
- Economic Modeling Specialists International (EMSI)
- CTE LaunchBoard www.calpassplus.org/Launchboard/
- Statewide CTE Outcomes Survey
- Employment Development Department Unemployment Insurance Dataset
- Living Insight Center for Community Economic Development
- Chancellor's Office MIS system

Contacts

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