



The Practical Skills Guide to U.S. Taxes

5 Steps to Land Your First U.S. Client or Job

By Joe DiChiara, CPA

Step 1: Learn the Basics

Understand key U.S. tax forms: 1040 (individual), 1120 (corporations), 1065 (partnerships).

1

Form 1040

The standard individual income tax return used by U.S. taxpayers

2

Form 1120

Used by corporations to report their income, gains, losses, deductions, and credits

3

Form 1065

Used by partnerships to report income, deductions, gains, and losses

Step 2: Master Tax Software

Familiarize yourself with tools like Drake, Lacerte, ProSeries, and TaxSlayer.



Drake

Known for its affordability and straightforward interface

Lacerte

Comprehensive solution with advanced features for complex returns

ProSeries

Popular for its user-friendly design and integration capabilities

TaxSlayer

Offers both professional and consumer versions with competitive pricing

Step 3: Build Your Compliance Foundation

Learn deductions, credits, record-keeping, and audit standards.

Deductions & Credits

Understand which expenses can be deducted and which activities qualify for tax credits

Record-Keeping

Master proper documentation methods to support tax positions and claims

Audit Standards

Learn what triggers IRS audits and how to prepare returns that meet compliance requirements

Step 4: Get Practical Experience

Work on sample returns, case studies, and mock clients.

Hands-On Practice Methods

- Complete sample tax returns from start to finish
- Analyze complex case studies with multiple tax implications
- Create mock client scenarios to practice client interactions
- Review completed returns to identify potential errors or improvements



Practical experience builds confidence and competence in handling real client situations.

Step 5: Find Clients & Jobs

Optimize LinkedIn, join freelance platforms, and partner with U.S. CPA firms.



LinkedIn Optimization

Create a profile highlighting your U.S. tax expertise, connect with potential clients and employers, and share relevant tax content



Freelance Platforms

Join platforms like Upwork, Fiverr, or specialized accounting marketplaces to find tax preparation projects



CPA Firm Partnerships

Connect with U.S. CPA firms looking for remote tax preparers during busy season or for ongoing client work

Quick-Win Checklist: 10 Skills Every Accountant Needs

Understanding Form 1040 basics

Master the fundamentals of individual tax returns

Small business taxation (Schedule C)

Learn how to report business income and expenses

Payroll tax fundamentals

Understand employer obligations and reporting requirements

Sales tax awareness

Know state-specific requirements and filing deadlines

Tax software navigation

Efficiently use tax preparation tools

IRS resources (Pub 17, IRS.gov)

Utilize official guidance and publications

Reconciling books for tax time

Ensure financial records match tax reporting

Year-end reporting

Prepare accurate W-2s, 1099s, and other forms

Client communication skills

Explain complex tax concepts clearly

Remote workflow management

Organize digital documents and virtual client meetings

Understanding Form 1040 Basics

Personal Information

Filing status, dependents, and contact information that affects tax brackets and available credits

Income Reporting

Wages, interest, dividends, business income, capital gains, and other income sources

Adjustments & Deductions

Above-the-line adjustments, standard or itemized deductions that reduce taxable income

Credits & Payments

Tax credits that directly reduce tax liability and payments already made toward tax obligations

Small Business Taxation (Schedule C)

Key Components of Schedule C

Business Information	Name, EIN, business code, accounting method
Income	Gross receipts, returns, other income
Cost of Goods Sold	Inventory, purchases, labor costs
Expenses	Advertising, insurance, rent, supplies, etc.
Vehicle Expenses	Mileage or actual expenses method
Home Office	Simplified or regular method calculations



Schedule C is essential for reporting sole proprietorship income and expenses on individual tax returns.

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