

Careers with **Franchise Tax Board**



Recruiting



ftb.ca.gov

Our mission is to provide the services and information to help taxpayers file accurate and timely tax returns and to pay the proper amount owed.

To accomplish this mission, we develop knowledgeable and engaged employees, administer and enforce the law with fairness and integrity, and responsibly manage the resources allocated to us.



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The Key to Our Organization

Dear Candidate,

California is a dominant force in the U.S. economy. California is also an international force in trade and commerce as well as scientific research, entertainment, and technology.

Our role in this vibrant economy is to administer California's personal and corporate tax programs. Franchise Tax Board (FTB) is known as a leader, an innovator, and a role model both nationally and among California state agencies.

So, what can a tax agency offer you in terms of a career? We are a progressive organization where you can expand your horizons as you grow into your potential. We provide opportunities for personal and professional growth in fields like accounting, administration, collections, legal, and technology.

We offer our employees a beautiful facility, a wide selection of benefits including an on-site cafeteria and credit union, challenging work, opportunities for growth, a diverse workforce, and we are just steps from the Sacramento Regional Transit District's light rail system.

We offer many of the things you are looking for, such as:

- » Flexible work hours and multiple commute options.
- » Paid holidays, including an annual personal holiday.
- » Challenging work in a supportive atmosphere.
- » Jogging trail, on-site showers, and bike lockers.
- » Health, dental, and vision care.
- » On-site child care.
- » Telecommuting.
- » CPA bonus.
- » Eligibility for long-term care and legal service plans.
- » Retirement plans.



From day one, working for us has additional benefits like on-the-job training, competitive salaries, and responsible work.

We would like to change your status from a **potential employee** to an **employee with potential**.

Come join us!

Selvi Stanislaus

Selvi Stanislaus
Executive Officer

The Franchise Tax Board Story

In 1929, the California State Legislature created the office of the Franchise Tax Commissioner to administer California's new Bank and Corporation Franchise Tax Act. Charles McColgan was the first Franchise Tax Commissioner and served until his retirement in 1950. At this point, the Legislature abolished the Franchise Tax Commissioner and created the FTB we know today.

We are recognized as a leader in California government. As a model tax agency for professionalism, innovation, and competency, we are at the forefront in public service, audit, collections, disbursement, and technology.

While we administer California's personal income and corporation tax programs, our organization has changed dramatically. More than 5,000 employees help collect over \$70 billion annually. We also administer additional nontax programs and delinquent debt collection functions, including delinquent vehicle registration debt collections, and court-ordered debt.

On the Leading Edge

We innovate to better serve California and its citizens. We overhauled our major technology systems while finding solutions that make it easier to file and pay taxes. We began accepting electronic filing in 1994. We now receive more than 80 percent of our tax returns electronically. We also made filing easier through the CalFile program, which provides free, direct electronic filing for most taxpayers. We improved our website and created self-service applications that allow taxpayers to get account-specific information or conduct certain transactions.

Join our Team

Great opportunities await you! Our strength comes from the capable, hard-working people who make FTB a great organization. We need innovative people to bring new ideas and help us continue our progress in all areas including program management, administration, accounting, marketing, communications, computer science, audit, collections, and automation.

Some of the skills and characteristics we look for in potential employees include, but are not limited to:

- | | |
|-----------------------------|---------------------------|
| » Analytical | » Computer Proficiency |
| » Communication | » Graphic Design |
| » Task Management | » Good People Skills |
| » Workload Flexibility | » Interpersonal |
| » Positive Attitude | » Organizational |
| » Assertiveness | » Leadership |
| » Effective Time Management | » Creative Problem Solver |
| » Decisiveness | |

If you have what it takes, we want you on our team.

The list below represents just some of our job classifications. For more specific information about minimum job qualifications, go to jobs.ca.gov and search for **minimum qualifications**.

Job Classifications

- » Accountant Trainee
- » Compliance Representative
- » Customer Service Specialist
- » Information Systems Analyst
- » Information Systems Technician
- » Investigation Specialist
- » Key Data Operator
- » Office Technician
- » Personnel Specialist
- » Programmer
- » Research Analyst
- » Seasonal Clerk
- » Senior Legal Typist
- » Staff Services Analyst
- » Student Assistant
- » Systems Software Specialist
- » Tax Auditor
- » Tax Counsel
- » Tax Program Technician
- » Tax Technician

The Hiring Process

Look for Exam Information

The exam is a preliminary screening tool that prequalifies you to be able to apply for job openings. Read the exam bulletin to determine if you meet the minimum qualifications required to take the exam.

Apply for an Exam

Complete a State Application (STD. 678) and mail it to the address on the exam bulletin by the final filing date. Read the exam bulletin carefully; there may be additional instructions.

Note: Some jobs require applicants to apply and take the exam online. See the exam bulletin for details.

Prepare for the Exam

The exam bulletin indicates the types of testing components used for the exam. They may include written tests, structured (oral) interviews, supplemental applications, performance tests, an Education & Experience examination (E&E), or Internet examination. Read the exam bulletin carefully, especially the Scope.

Exam Results

You will receive your exam results by mail or when you complete the online exam. Your score determines where you rank on an employment list. You may start applying for job openings as soon as you receive notification that you passed your exam.

Apply for Job Openings

We hire individuals within the top three ranks on an employment list. However, you could become reachable as hires are made and candidates are removed from the list. We encourage you to browse job openings and apply for all classifications where you meet the minimum qualifications. Use the eligible list disclosure tool on the Careers in California Government website jobs.ca.gov to find your current exam ranking. Follow the instructions at the bottom of each job opportunity notice to apply. Send all requested documents to the address on the notice by the final filing date.

Prepare for the Interview

If we contact you for a hiring interview, prepare by reviewing the duties and responsibilities on the job opportunity notice. If you are not selected, continue to apply for other job openings.

Probation Period

After you have been hired, you will serve a probationary period of six months to one year depending on your classification. When you successfully complete your probation, you become a permanent state employee.

Applicants who are not currently employed with us will be subject to a pre-employment background investigation. The investigation will consist of completion of a pre-employment questionnaire, fingerprinting, an inquiry to the Department of Justice to disclose criminal records, and a review of our records to make sure you have complied with all state income tax laws. If you think you may have tax compliance issues, call 800.852.5711 to resolve them before you apply.

Office Locations

Our central office is located in Sacramento, California, and we also have multiple field offices to better serve California taxpayers. Our field offices provide a base of operations for local audit staff. Some of our offices also include public service counters for taxpayers to speak directly with Collectors and Customer Service Specialists.



Career Opportunities

Processing Services

Join the fast-paced processing team where Key Data Operators (KDO) process millions of tax documents and payments each year. A majority of our operators start on a part-time basis. We hire approximately 100 new staff each year who key tax information to help us meet the needs of our tax-filing season. In these entry-level positions, you will receive training, use computer-based data entry programs, and work in a team environment.

In Processing Services, we encourage your career advancement and provide you with opportunities to move up into technical or management classifications.

Contact Center

Are you looking for a challenging and interesting career that is full of opportunities for professional and personal growth? If so, consider a Tax Technician career in our Contact Center! We seek enthusiastic and qualified individuals to assist California taxpayers.

Our Tax Technicians serve a diverse public, from homemakers to corporate executives. We explain income tax laws, so taxpayers can understand and comply with the process of filing and paying their state income taxes. We assist with general tax questions and provide information regarding delinquent debts. Our Tax Technicians provide assistance by phone, correspondence, and Live Chat. In addition, our bilingual call center provides assistance in Spanish. In every instance, we strive to exceed our customers' expectations by resolving taxpayer issues at the first point of contact.

We provide extensive classroom and on-the-job training to ensure you have the best tools to do your job. We have a support system of excellent trainers, leads, supervisors, and managers who want to ensure your success. We encourage upward mobility and provide the necessary tools to achieve your personal goals. Our thorough training provides our Tax Technicians with skills that are sought throughout the entire department.

In addition, we offer a professional work environment where you are respected and recognized for your contributions.

If you enjoy helping people and want to resolve problems at the first point of contact through the integration of workloads and technology, our Contact Center is the place for you to begin your path to success!

Collections

As a Tax Technician or Compliance Representative in Collections, you will provide taxpayers with information and offer solutions to help them resolve delinquent debts. In addition to working with tax issues, you may have the opportunity to work with vehicle registration fees, court-ordered debts, field and manual collections, administrative functions, and special programs.

Most of our staff in Collections communicate directly with taxpayers, either on the phone or in person in a field office. Most of our employees are located at our central office in Sacramento. We also offer assignments in field offices located throughout the state.

New collectors receive eight to ten weeks of formal classroom training and up to one year of on-the-job training for basic collection techniques. As new technologies become available or new laws impact our processes, we provide additional training to ensure staff is current with issues that affect business practices.

We give you the training and tools to succeed and launch a career that offers tremendous opportunities in a wide variety of technical and management fields. A career in Collections will provide you with the opportunity to learn valuable skills that you can use in business areas throughout our department.

We offer many exciting and varied workloads in the following areas:

- » Personal Income Tax Contact Center
- » Business Entities Collections
- » Non-Tax Debt Collections
 - » Vehicle Registration
 - » Court-Ordered Debt

- » Special Programs
 - » Offer in Compromise
 - » Bankruptcy
 - » Lien Desk
 - » Innocent Spouse
- » Field and Complex Collections

Technology Services

The Technology Services Division supports the information technology (IT) infrastructure essential to the success of the department's programs. Because we support our own data center and work with various technical platforms and projects, we offer a wide variety of IT positions for upward mobility.

We offer ongoing technical and professional training. We offer in-house training and mentoring, as well as vendor training and seminars. We value the importance of education to ensure our staff's success.

Our technical staff serves both internal and external customers. We promote constant design and development of the infrastructure necessary to provide a continual robust and stable environment for the department.

We have over 900 IT professionals working for our organization in our central office. There are currently seven IT classification levels available. To find out more about these classifications, go to ftb.ca.gov and search for **technology careers**.

In our division, you can embrace innovation and the challenges of the future to deliver first-class products and services.

Audit and Taxation

Working as a tax auditor allows you to combine your passion for auditing and taxation in an excellent work environment. We can provide a dynamic career filled with challenge and opportunity for professional and personal growth.

Our tax auditors ensure California taxpayers file their state tax return accurately. Auditors contact taxpayers to obtain information, research tax law, analyze books and records, and prepare reports. Our auditors work closely with taxpayers, legal representatives, and company executives to resolve their cases.

Auditors in the Audit Division examine state income tax issues for personal, corporate, and pass-through entity taxpayers. Various other department programs also require a tax auditor's knowledge, including:

- » Political Reform Audit
- » Internal Audit
- » Criminal Investigation
- » Exempt Organizations
- » Economic and Statistical Research
- » Fraud and Discovery

You can advance from a Tax Auditor to a Program Specialist where you work as a technical tax expert or advance to an Administrator where you lead and supervise a business area.

Tax Law

As an attorney, you will have the opportunity to work on complex, cutting-edge tax issues that may have statewide and even nationwide applications. Our legal team consists of attorneys with diverse educational and professional experiences. In our Legal Division, you can develop strong skills as an attorney, gain solid expertise in taxation and other issues, and acquire substantial knowledge and experience that can help you meet your personal goals and professional objectives.

Your role as an attorney can range from providing tax advice to working collaboratively with the Attorney General's Office presenting cases to the United States Supreme Court – and everything in between. Attorneys perform a variety of functions that may include:

- » Development and determination of administrative protests.
- » Appeals to the Office of Tax Appeals.
- » Litigation in conjunction with the California Attorney General's office.
- » Drafts of advice memoranda and rulings, both internal and external.
- » Drafts of regulations and establishment of tax policy in conjunction with the three-member Franchise Tax Board, the California Legislature, and the Governor's Office.
- » Act as in-house counsel to a state agency with over 6,000 employees.

Our Legal Division also offers career opportunities for paraprofessionals, including legal analysts and legal typists. Motivated paraprofessionals can enhance technical legal expertise by working with some of California's top tax attorneys. Legal analysts assist in the administration of protest, litigation, and regulatory matters. As a legal analyst, you may conduct legal research while handling tax appeals and coordinating procedures with the Office of Tax Appeals. Legal typists are assigned to several attorneys to provide legal, clerical, and administrative support.

Criminal Investigation

Here is your opportunity to uphold the state income tax law as a peace officer. After successful completion of a 17-week police officer academy with a strong emphasis on white-collar financial crimes, you will have the full range of peace officer duties and responsibilities as a sworn peace officer. You will plan and conduct criminal investigations, including planning and executing search and arrest warrants, conducting surveillance, and testifying in court. In this highly dynamic environment, you will have the opportunity to travel throughout the state in search of income tax violators and bring them to justice.

In addition to our sworn peace officer positions, we also have a variety of nonsworn positions, including forensic auditors. As a forensic auditor, you will have a critical role in the criminal investigation. You will review, organize, and analyze financial records obtained during the course of the investigation. You will have the opportunity to participate in interviews of suspected income tax violators and participate with search warrants by assisting in the search for evidence. Finally, you will prepare income tax schedules to determine tax deficiencies and testify in court to your findings.

Financial Management

Within every organization there is an accounting section that keeps the financial operations running efficiently. Our Financial Management Bureau ensures the department accurately and systematically accounts for billions of dollars of revenue, expenditures, receipts, disbursements, and state property.

You would be responsible for payment of the department's expenditures; prepare financial statements, reconciliations, and reports; or oversee the departmental budget and various section budgets. If you are interested in accounting information systems, you can manage our accounting and reporting system, develop and maintain our accounting subsystems, and serve as a resource to senior management as well as other internal and external teams and organizations.

Economic and Statistical Research

The Economic and Statistical Research Bureau (ESRB) produces high-quality income tax data. This data is used by the Franchise Tax Board, policy makers, the public, and other stakeholders in order to assess the historical and current impact of established tax laws and policies. The information provided enables users to discuss and debate proposed changes to income tax policy and administration.

As a member of ESRB, you may use computerized editing tools to collect samples of large quantities of data. The data can be used to generate reports as well as assist other California organizations like the Department of Finance and Legislative Analyst's Office with policy analysis. In addition to revenue and tax studies, you may also conduct research on California's underground economy and population migrations out of the state.

The majority of our research is conducted by economists and analysts within our bureau. You may also collaborate on studies in conjunction with departmental staff or external academia. We continuously plan to ensure talent, expertise, organization, and tools are available to meet the future demands of the bureau's customers.

Other Opportunities

Student Assistant

Being a Student Assistant gives you the opportunity to gain technical and practical work experience in your field of study while developing familiarity with our programs.

Student Assistants work with networked computers and software programs, learn procedures for processing an audit case file, help maintain accurate taxpayer account information, or assist numerous other programs to process a variety of workloads. You can develop your abilities in communications, task management, data analysis, customer service, and information systems. Working with fellow employees and mentors is an opportunity to network with industry professionals while advancing your leadership skills.

Compensation can include competitive wages based on your college and work experience in California state service. We also provide limited benefits, like paid leave and special deferred compensation plans.

As a Student Assistant, you must maintain continuous college enrollment of at least six units each semester (nine quarterly units) and maintain a minimum 2.0 GPA. Student Assistants may work flexible schedules to accommodate their academic calendars and course loads.

You will get paid to learn, gain valuable work experience, and preview a full-time career.

Seasonal Clerk

We hire up to 1,000 Seasonal Clerk positions to perform a variety of clerical tasks during our peak tax filing season. Seasonal Clerks typically work from January through May of each year.

Seasonal Clerk duties are diverse and may include, but are not limited to:

- » Open, review, and sort incoming mail.
- » Analyze and correct tax return information.
- » Respond to basic taxpayer inquiries by telephone.
- » File and copy records, reports, and various documents.

Job opportunities are typically posted annually. To qualify for this position, you must:

- » Read, write, and speak English.
- » Perform simple clerical work.
- » Follow oral and written directions.
- » Complete a background check process.

Individuals who are exceptional in terms of work ethic, attendance, and overall performance may be able to work beyond the peak season.

Many of our current permanent employees began their careers as Seasonal Clerks. This position could provide you the starting point for your new career for the state of California.

Bilingual

We also offer opportunities for certified bilingual positions, which pay an additional \$100 a month. To qualify for these positions, you must have bilingual certification and indicate your bilingual proficiency on your State Application (STD 678).

Organizational Values

» Lead with Integrity and Inspiration

As inspirational leaders, we are committed to pursue the right path, ignite ideas and innovation, communicate clear expectations, and invite everyone to optimistically maximize their potential every day.

» Bring Our Best

By bringing our best we exemplify honesty, credibility, and accountability. We value staff and encourage them to bring their best every day.

» Deliver Excellent Products and Services

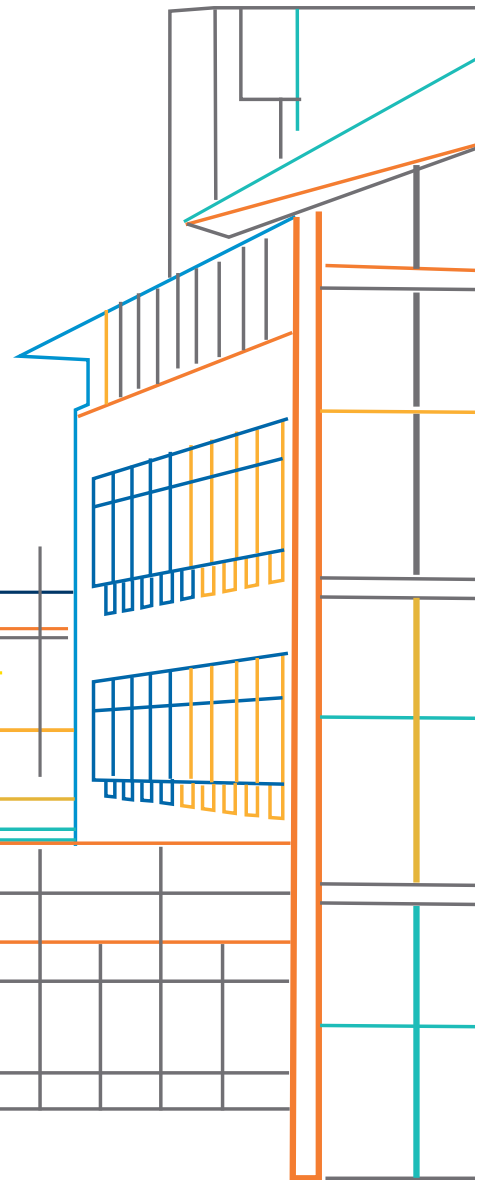
Quality is best achieved through collaboration with our customers and each other. We deliver excellent products and services that meet the needs of our customers.

» Contribute to a Caring Community

We encourage mutual respect, kindness, and teamwork. This creates a supportive work environment that appreciates diversity and allows all of us to flourish in the community we work and live in.

» Become Experts at What We Do

We are motivated to continually improve and grow. We take advantage of tools and opportunities to develop in our chosen career path.



Benefits

Below are just some of the great benefits we have to offer you...

Health

- » Medical, dental, and vision plans that cover the employee, spouse, and their dependents.
- » FlexElect program that offers medical and/or childcare reimbursement accounts and cash options when covered on spouse's medical or dental plans.
- » Accrual of vacation, sick, and other types of leave for personal and family.

Financial Security

- » Retirement benefit plan.
- » Savings Plus program that includes 401(k) Thrift Plan and 457 Deferred Compensation Plan.
- » Opportunities for advancement.

Work/Life Balance

- » Flexible work schedules.
- » Employee assistance programs.
- » Career counseling.
- » Education reimbursement for upward mobility and career-related courses.

Insurance for Eligible Employees

- » Life insurance.
- » Long-Term Care Program.
- » Group Legal Services Insurance Plan.
- » Central Office amenities.

Central Office Amenities

- » Three on-site child care centers.
- » Cafeteria, snack bars, and coffee bars.
- » Light rail and bus service.
- » Outdoor running track.
- » On-site security officers.

For more information about employment benefits for the state of California, go to calhr.ca.gov.





STATE OF CALIFORNIA
Franchise Tax Board

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to an **employee with potential**.

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