

## **Example Objectives & Strategies**

### **1. Career/Occupational:**

As a second level intern, I will develop my skills as an employee at the firm. I want to progress from completing assignments without having much knowledge of the client to developing a stronger understanding of the client to more effectively complete returns and manage relationships. Also, I will gain a better understanding of the career paths available, and the routes you can take to accomplish individual as well as firm-wide goals. Through this internship I will also be able to gain more exposure to the other services offered by the firm and how they benefit current clients.

To gain a better understanding of clients and their background, I plan on talking with other employees and looking at previous returns and documents. I will attend various client meetings to begin interacting with clients and learning more how the process works. Also, I'd like to see how the different departments within the firm interact and relate to one another through questions and interacting with them through client work. I plan to attend meetings with members of the firm from various departments, including Kuntz Leshner Capital, to gain a better understanding of the firm.

### **2. Technical Skills/Knowledge:**

Through my experience, I would like to learn more about the software used by the firm and all of the benefits it has for both employees and clients. Also, I will be working on more complex returns, including multi-state returns and returns with greater volume and activity. Through this, I will learn more about the different business entities that exist and how different state taxation rules impact these entities.

To develop my skills and knowledge using the software, I plan on asking more questions about how things are done, taking notes, and learning through error. I will learn more about multi-state taxation through the completion of these returns and comparing them to the previous year. During this internship, I will have the opportunity to work on more complex business returns that involve more areas of taxation than I have been exposed to previously.

### **3. Personal Development Objectives:**

I would like to continue to develop my communication skills by asking more questions and talking with employees. I intend to be more comfortable with my coworkers and develop relationships with them that extend beyond the work environment. Through my internship, I also will learn more about the business environment and how to transition into it in the coming year.

As an intern, I plan on talking to others and stepping outside my comfort zone. I want to continue to meet people at the office and learn more about the people I already know. I would like to know more about everyone and their lives outside of work to better form these relationships. Also, I will ask questions and continually talking with them about work-related and non-work-related topics. I will be able to meet with members from various departments about how they got where they are today, their likes/dislikes about the work, and any advice they may have.

#### 4. Organizational Activity Objectives:

As a summer intern, I will have the opportunity to build relationships with my coworkers and become an integral part of their team. I would like to learn and develop the skills that my coworkers have, because I can see how they have made them as successful as they are today. I would like to continue to increase my responsibilities at the firm in regards to workload and difficulty level.

I plan on participating in more activities at the firm to know my coworkers even better. I hope to develop friendships with my coworkers and spend more time with them. I feel as though this will help me transition into the professional world, as well as increase my communication and relationship development skills. Also, I will be able to attend firm-wide activities which will give me exposure to employees at other offices, including York and Reading.

#### **Evaluation:**

I plan to evaluate myself based on how I prepare returns and the complexity I can handle. Also, I will look at how I learn from my mistakes and make improvements as the internship progresses. I will ask new questions each day to continue this learning process. My supervisors will evaluate me on how successful I am at completing returns and how I can effectively manage my workload. They will also look at the level of returns I am completing and how I am progressing as an employee. My faculty sponsor will evaluate me on how well I function as a member of the firm and what I learned from my experience.