

Eide Bailly

Internship Experience Guide

Congratulations on starting your internship with Eide Bailly! We are truly excited that you chose Eide Bailly to be a part of your early career journey. As you get started, we have listed below the key contacts that are here to support you over the next few months. Please note, you may always contact your campus recruiter as an additional resource.

Eide Guide: Assigned to you as a point of contact for day-to-day questions in addition to your manager. *If you are not sure who your Eide Guide is, ask your department head or Office Administrator.*

Senior Associate/Manager: As an intern, you are assigned jobs to work on. In audit, this might be a client audit. In tax, this might be a handful of returns to complete. In OMS, it might be the client you're assigned to work with. Each job may have a different manager/senior manager responsible for assigning day to day work and approving any scheduling requests. Once you discover who the manager/senior manager is for the job you're assigned to, you can go to this person with questions regarding your work, your schedule, general department questions, or feedback on your work.

Department Head: Leads the department's vision, strategy, and recruitment efforts. You can go to this person with questions regarding your work, your schedule, or general department questions.

Office Administrator (OA): Lead administrator and resource for staff and interns in the office. Oversees office policies and common practices, onboarding, technology, purchasing, supplies and more. Involved in office events, parties, socials, and community service activities.

HR Business Advisor (HRBA): Available to address any HR-related questions or concerns, ensuring you have a positive and rewarding experience throughout your internship. *If you do not know who your HRBA is, you can ask your department head or find it by going to the Hive on Springboard > Apps > HR & Benefits Information tile. Scroll to the bottom and click Find myHR Contact. Under the HR Business Advisor Team tab, you can find your HRBA by looking under their names for assignment.*

Benefits: If you have questions about benefits, please email benefits@eidebailly.com.

IT Help Desk: If you need technology assistance, please email ITSHelpDesk@eidebailly.com.

GENERAL LEARNING OUTCOMES FOR ALL INTERNS

- Understand the value we bring to clients through the work we perform for them
- Develop business acumen skills to effectively engage & build relationships with clients
- Embrace feedback openly with a receptive attitude, identify skill-building opportunities, and enhance the delivery of quality client work (e.g., through review points and formal feedback)
- Understand the value of working with a team of professionals with varied experience to accomplish the goal of serving clients
- Demonstrate the ability to compile reconciliations, workpapers, and other client data in an organized manner
- Exhibit adaptability by completing projects as assigned to support department needs
- Gain perspective on the Firm and the potential opportunities it brings

DEPARTMENT SPECIFIC LEARNING OUTCOMES

Assurance:

- Gain a comprehensive understanding of the audit process, including planning, risk assessment, testing, and reporting
- Audit cash, prepaid expenses, fixed assets, and accounts payable
- Recognize performance and documentation requirements of compilation and review engagements
- Identify and process deviations from expectations when testing transactions through predetermined procedures
- Develop the skills necessary to identify and resolve simple and complex accounting and engagement issues, applying critical thinking and analytical skills to discuss issues with in-charges

Tax:

- Gain a comprehensive understanding of the procedures, roles, and software used in the tax preparation process
- Analyze, prepare and reconcile a basic to medium individual or business income tax return with minimal errors and participate in select phases of complex tax compliance engagements
- Explore basic concepts including gross income, deductions, gains/losses, tax, credits, etc.
- Stay updated in changes in accounting and taxation standards and regulations through internal Tax News Network webinars

Outsourced & Managed Services:

- Gain a comprehensive understanding of Eide Bailly's processes for outsourced accounting, including what is involved in preparing financial statements
- Identify issues, propose solutions, and problem solve circumstances to get to a result while reviewing and adjusting financial statements accounts
- Perform various reconciliations on the balance sheet, including bank accounts, credit cards, and other items as needed
- Assist with 1099 processing, QuickBooks cleanup projects, and process accounts payable

SKILLS EVALUATION

Eide Bailly managers and partners have identified that successful interns are proficient in the following five skills and the bullets demonstrate what our expectations would be of our interns in these skills. To get a baseline for where you are currently at and to be intentional about growing in these skills throughout your internship, take a moment to complete a self-evaluation on each of these skills, using this rating scale.

- 1 = Does not meet expectations
- 2 = Partially meets expectations
- 3 = Meets expectations
- 4 = Exceeds expectations
- 5 = Far exceeds expectations

Communication:

- Clear and concise expression of ideas
- Active listening and understanding others' perspectives
- Articulate and organized presentation of information
- Adaptability in tailoring communication to various audiences
- Responsiveness and promptness in addressing inquiries or concerns
- Ability to ask thoughtful questions, including when to ask and who to ask

Where are you now? Rating: 1 2 3 4 5
How can you work on this skill?

Problem Solving/Critical Thinking:

- Analytical thinking to break down complex projects into manageable components
- Ability to gather and evaluate relevant data and evidence
- Creativity in exploring unconventional solutions
- Deductive and inductive reasoning to reach well-reasoned conclusions
- Open-mindedness to consider diverse perspectives before making decisions
- Ability to evaluate several projects and set priorities to reach goals

Where are you now? Rating: 1 2 3 4 5
How can you work on this skill?

Notes:

Teamwork/Collaboration:

- Active participation and engagement in group projects.
- Willingness to share knowledge and expertise with team members and learn from team members' knowledge and expertise
- Values others' contributions to the team
- Adaptability in accommodating different working styles and opinions
- Positive attitude and readiness to help others when needed
- Effective conflict resolution and a focus on achieving collective goals

Where are you now? Rating: 1 2 3 4 5

How can you work on this skill?

Desire to Learn:

- Eagerness to take on new projects or responsibilities
- Ability to ask questions to understand the task and the logic or reasoning behind the task
- Curiosity to explore different interest areas
- Openness to feedback and constructive criticism
- Proactivity in seeking out resources for growth and development

Where are you now? Rating: 1 2 3 4 5

How can you work on this skill?

Professionalism:

- Provides respectful, appropriate, and timely written and verbal communication with peers, supervisors, leaders, and clients
- Customer-service mindset that prioritizes excellence in client services
- Reliability and punctuality in meeting deadlines and commitments
- Integrity in handling sensitive information and financial data
- Adherence to ethical principles and industry regulations
- Respectful and courteous interactions with colleagues, clients, and superiors
- Ability to maintain composure in challenging situations
- Ability to learn the expectations of the role through experience and supervision

Where are you now? Rating: 1 2 3 4 5

How can you work on this skill?

Notes:

GOAL SETTING CHART

The goal setting chart is a tool designed to help you set and track your personal and professional goals during your internship. It's a valuable resource for self-reflection and personal development. This chart is solely for your self-assessment; you are not required to share it, but it could be helpful to discuss with a manager or partner you work closely with. We encourage you to review your goals and progress once a month throughout your internship.

GOAL	KEY ACTIONS	TIMEFRAME	NOTES

FIRM HOLIDAYS SPECIAL DATES AND EVENTS:

- New Year's Day
- Martin Luther King Jr. Day
- Friday before Memorial Day & Memorial Day
- Independence Day & day after
- Labor Day
- Thanksgiving & day after
- Christmas Eve & Christmas day

OFFICE SPECIAL DATES AND EVENTS:

- National Intern Day – last Thursday in July
- International Accounting Day - November 10th