

Name

Email ▪ Cell ▪ LinkedIn

Experience

Company 1

Location

Staff Accountant

May 2018 to April 2019

- Managed the monthly and year-end accounting of more than 30 clients including real estate investment accounts with over \$10 million in assets
- Prepared over 40 federal and state tax returns for C-corps, S-corps, partnerships, complex trusts, and individuals
- Compiled annual financial statements in accordance with SSARS promulgated by the Accounting and Review Services Committee of the AICPA
- Collected documentation and provided assistance in IRS audits for high-net-worth individuals
- Managed client payroll including the filing of forms 941, 940, W-2, and 1099-MISC
- Provided wealth management services specializing in retirement portfolio management

Volunteer Income Tax Assistance

Location

Tax Preparer

January 2018 to April 2018

- Prepared individual tax returns for clients
- Communicated with clients to address their concerns regarding eligibility for deductions, credits, and refunds

Education

Bachelor of Science in Accounting

Degree Awarded: August 2017

University of Someplace, Campus, Random School of Business

Location

3.59 Overall G.P.A., 3.78 Accounting G.P.A.

The Uniform CPA Examination passed March 2018

Skills

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- Proficient in QuickBooks, QuickBooks Online, Lacerte, and Excel
 - Familiar with ADP Run and Intuit Payroll Processing
 - Tax preparation with an emphasis on flow-through entities
 - Strategic tax planning and analysis
 - Investment portfolio analysis