

Client Name

Staff & Tax Accountant Summary

Diligent and service-oriented professional with demonstrated success in preparing / managing company's tax statement / returns and providing management with vital financial information after analyzing and researching accounts.

Instrumental in applying company's specific audit methodology to assist with various stages of audit process. Adept at assisting in financial planning, preparing income, statement accounts, and tax returns for audit purpose. Skilled in performing account analysis and reconciliations, formulating consolidated financial statements, implementing correct accounting procedures, and providing accounting assistance during mergers and acquisitions. Equipped with exceptional leadership, interpersonal, problem-solving, innovative, communication, and time-management skills.

Areas of Expertise

- Tax Returns
- Customer Service
- Financial Statements
- Process Improvement
- Business Operations / Development
- Data Integrity
- Due Diligence
- Tax Planning
- Accounting Management

Career Experience

Associate, Global Business Operations, KPMG

2018 – Present

Resolve Global Support business inquiries to facilitate professionals. Liaise with business leads to assess, execute, and maintain business requirements. Implement special projects as requested by management, while complying with company standards.

- Established and maintained processes to resolve potential queries that affect data in Global Applications.
- Managed organization's volunteer development and special event committees to excel in achieving goals.
- Oversaw data integrity procedures to guarantee highest quality data.
- Ranked consistently in top three in department for production due to consistently delivering results.

Tax Preparer, Liberty Tax

2018 – Present

Interview clients to collect financial information on taxable income, deductible expenses, and allowances. Prepare or aid individuals and small businesses with simple to complex tax returns. Answer questions and assist clients with future tax planning, including development of financial plans. Manage team of three tax preparers to streamline operations.

- Ensured correct tax form completion by furnishing taxpayers with sufficient information and advice.

Staff Accountant, Robert Belmont Consulting

2015 – Present

Carry out processing and recording of accounts payable and receivable transactions to ensure zero discrepancies. Formulate and assess monthly budget / forecast to actual variance reports. Facilitate in preparing financial statements and month / quarter / year end closing procedures to meet scope.

- Prepared tax returns (1040s, 1065s, and 1120s) to mitigate loopholes.

Life Producer, World Financial Group

2010 – Present

Apply knowledge of securities, investment plans, market conditions, and regulations to optimize operations. Interview client to identify financial position, resources, assets to invest, and financial goals.

- Sold financial products and services to clients for investment purposes to achieve goals and objectives.
- Solicited new business from existing customers to deliver consistent high results.

Senior Personal Loan Specialist, One Main Financial

2017 – 2018

Determined which potential borrowers represent good risk opportunities for company using professional judgement. Facilitated customers in making right financial decisions to help in attaining financial goals. Oversaw servicing and collection activities to ensure seamless workflow.

- Carried out business development and full cycle sales of personal loans, auto loans, and other credit related products.
- Ranked consistently in top 3 of lending due to optimal level of personal excellence and assisted in managing office as well.

Station Manager, Enterprise Holdings

2014 – 2017

Monitored employees of specific operational functions and entire location to streamline operations. Executed all department scheduling, interviewing, recruiting, and training employees, while adhering to rules and regulations. Addressed all customer complaints and resolved all issues in timely manner to ensure client retention.

- Managed brand delivery and integrity for all rental programs in accordance with rules and regulations.
- Ensured high quality customer service by proactively seeking process improvement.

Additional Experience

Junior Accountant

Greater Community Bank

Reconciliations Clerk

Valley National Bank

Education

Bachelors of Science in Accounting

William Paterson University, Wayne, New Jersey