

Samantha Lee

Licensed Certified Public Accountant in the state of Arizona with 10+ years of experience in Financial analysis, internal auditing, and tax accounting. Seeking an opportunity to help a business make informed financial decisions

WORK EXPERIENCE

Senior Tax Accountant, Vesco Associates

Phoenix, AZ • January 2019 — Present

- Assume full responsibility for directing multiple tax accounting engagements
- Provide clients with Tax Compliance, Research, Consulting for corporate, partnership and individual returns
- Oversee the direction of a team of tax specialists in the delivery of tax services
- Initiate and present effective tax planning strategies for a diverse range of middle market clients.
- Research and report on trends and developments concerning complex domestic and international tax issues.

Tax Accountant, Publico

Phoenix, AZ • June 2013 — December 2018

- Devised individual (1040) and business tax returns (1120,1120's,1065) and associated schedules and financial statements
- Lead tax planning and minimization analysis as the supervisor of a team with senior and junior staff members.
- Prepared personal and business tax returns for federal, state, corporate, individual, and partnerships for a minimum of 2 tax seasons at a time.
- Organized research and results with spreadsheets, tax prep and bookkeeping software for transparency
- Collected and researched data, synthesized complex information, and presented findings.

Accountant, StaffResidual

Phoenix, AZ • January 2011 — June 2013

- Maintained lead schedules for various balance sheet accounts and record related entries, including intercompany, fixed assets and prepaid expenses.
- Assisted with accounting for digital advertising sales as company ramps up efforts to monetize existing properties, including invoicing, reconciliations between ads purchased and ads run, and application of payments received.
- Reconciled various bank accounts. Prepare and record entries for the monthly close, including reclasses and accruals.
- Prepared audit schedules, providing document support and managing inquiries for two annual financial statement audits.
- Acted as backup for the entire accounts payable payment process, including batch preparation, data transfer to general ledger and payment setup using online banking platform.



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 twitter.com/sam.lee

LANGUAGES

English

Cantonese

Spanish

French

EDUCATION

University of Arizona

Tucson, AZ

2006 — 2010

B.S. Accounting

CERTIFICATIONS

Certified Management Accountant (CMA)

2013

Certified Public Accountant (CPA)

2011