Jessica Claire

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Professional Summary

Focused Account Specialist with 8 years of experience. Adept at writing detailed reports and budgets, completing detailed financial analysis and planning strategically for top client services. Detail-oriented with extensive knowledge of cash and record maintenance and comprehensive account reconciliations. Accomplished Tax Accountant with Bachlor degree and proven fiscal budgeting and forecasting expertise. Analyzed and resolved complex tax issues for large corporation and obtained substantial tax savings over 8 years. Utilized macro- and micro-level perspectives to achieve optimum results.

Skills

- Calculating liabilities
- Tax accounting specialization
- Advanced bookkeeping skills
- ATX Total Accounting Office proficiency
- Corporate tax planning knowledge
- Data trending knowledge
- Intuit QuickBooks specialist
- Invoice coding familiarity
- Account reconciliation specialist
- Account reconciliation processes
- Cash Flow analysis
- Data Entry
- Partnership accounting
- QuickBooks expert
- Audit coordination
- Financial Management
- Account Reconciliation
- Financial reporting specialist
- Financial statements expertise
- Bookkeeping
- Closing processes
- Budget Analysis
- Tax law understanding
- Accounting procedures consultant
- Financial Reporting
- Finance
- Superior attention to detail
- General ledger accounting expertise
- Administrative support

Work History

Accountant, 11/2013 - Current
Transamerica Life Insurance Company – Evanston, IL

- Facilitated communication between clients and tax authorities
- Contacted IRS or other relevant government organizations on behalf of client to address issues related to tax self-preparation
- Prepared written responses or tax return amendments to resolve state and federal notices
- Prepared tax returns individuals and corporations according to government regulations and requirements
- Facilitated integration of modern tax software with client accounting software
- Prepared wide array of returns such as corporate, fiduciary, gift, individual and private foundation returns
- Prepared US, multistate and international tax returns for business clients
- Provided information about available products and services, including health and life insurance services, to clients, resulting in increased business opportunities
- Consulted with clients to assess and mitigate future tax liabilities and determine eligibility for tax abatement
- Completed and filed returns with tax departments at local, state and federal levels
- Maintained high-quality control standards by reviewing internal tax preparation documents for missed tax benefits
- Reviewed available data and compared against tax code to determine exemptions, deductions, and potential liabilities
- Maintained complete records of client tax returns and supporting documentation in secured areas
- Interviewed 500 clients to collect information and gather necessary paperwork prior to preparing tax returns
- Prepared tax returns, extensions, tax planning calculations and write-ups for all types of organizations and entities, including individuals
- Reviewed clients tax filing papers thoroughly to determine eligibility for additional tax credits or deductions
- Conducted reviews of internal tax documentation, reducing errors related to missed tax benefits
- Offered clients recommendations to reduce tax liabilities

Insurance Sales Agent, 02/2011 - 05/2013
Pma Usa – Amf Ohare, IL

- Directed 25 employees and preferred partners to facilitate sales and renewals of stop-loss products.
- Performed needs analysis to obtain information required to make appropriate health insurance product recommendations.
- Customized health insurance programs to suit 300 individual clients, boosting sales 50%.
- Explained features, disadvantages and advantages of 300 policies to promote insurance sales.
- Answered hundreds inbound calls per month from existing and future policyholders to answer inquiries and discuss insurance options.
- Scanned, received and sent faxes to appropriate departments, including insurance claims, co-pay assistance information and patient documentation.
- Displayed consistent, positive attitude towards customers, peers and other personnel, even during high-stress situations.
- Scheduled fact-finding appointments and consultations to determine client needs and overall financial situations.
- Upsold additional products and services after identifying customer needs and requirements.
- Determined financial needs by assessing existing coverage and aligning new products and services with long-term goals.

Insurance Agent, 05/2007 - 02/2010
Barrett Business Services – Stockton, CA

- Promoted united life insurance products and services using upselling and other sales strategies
- Approached potential clients by using direct marketing techniques, including mailings and phone contacts
- Displayed consistent, positive attitude towards customers, peers and other personnel, even during high-stress situations
- Determined financial needs by assessing existing coverage and aligning new products and services with long-term goals
- Worked to accommodate new and different insurance requests and explored new value opportunities to optimize insurance agency reputation
- Upsold additional products and services after identifying customer needs and requirements
- Scheduled fact-finding appointments and consultations to determine client needs and overall financial situations
- Created sources for continuous client referrals within community and with businesses using social media and other telecommunication
- Created sources for continuous client referrals within community and with businesses using [Skill] and [Skill]

Education

Bachelor of Arts: Accounting And Business Management, 11/1997
Birzeit UNIVERSITY - Palestine