

Sherry Holmes

Senior Tax Advisor II - H & R BLOCK

Corona, CA
jodysah@aol.com - 951-496-3214

WORK EXPERIENCE

Senior Tax Advisor II

H & R BLOCK - Corona, CA - December 2006 to Present

Prepared simple to complex tax returns for individuals or small businesses.

Administered all appropriate adjustments, deductions, and credits to keep client's liability to a minimum.

Interviewed clients to obtain additional information on taxable income and deductible expenses and allowances.

Reviewed financial records such as income statements and documentation of expenditures in order to determine forms needed to prepare tax returns.

Furnish taxpayers with sufficient information and advice in order to ensure correct tax form completion.

Consulted tax law handbooks and bulletins to determine procedures for preparation of atypical returns.

Provided clients with information on H & R Block's other financial services such as Mortgage Loans, IRA and Financial Planning.

Commercial Lines Underwriting Assistant

J. L. von Arx & Associates - Corona, CA - July 2007 to August 2008

Corona, CA

July 2007 - August 2008

Medium-sized Retail & Wholesale Insurance Agency

Commercial Lines Underwriting Assistant

Directed renewal flow through the units for maximum efficiency, quality, and time-sensitivity.

Assisted underwriters in completion of file documentation, including vehicle report data and financials.

Responded to agents inquiries regarding rates, rating, policy issuance and transactions status.

Demonstrated high knowledge of rating policy processing and office procedures.

Managed large book of business to meet and exceed corporate standards.

Account Executive

ANDREINI & COMPANY - Metro, CA, US - July 2005 to November 2005

Serviced renewal and new business for Middle Market Accounts for multi-line, multi-state accounts including renewal marketing, preparation for renewal specifications, premium negotiations, proposals, binders, coverage summaries, policy checking, file maintenance, certificates, motor vehicle reports, endorsements and audits.

Demonstrated ability to work independently and utilized time management skills to accomplish tasks in a timely manner.

Client Representative II

MARSH RISK & INSURANCE SERVICES - San Diego, CA - June 2003 to April 2005

Serviced renewal and new business Middle Market Accounts for multi-line, multi-state and international accounts including renewal, new business specifications, proposals, binders, insurance summaries, policy checking, invoicing, endorsements, audits, claim reporting, and follow-ups, file maintenance, direction and oversight of Insurance Assistant(s).

Demonstrated ability to be multi-task oriented and flexible to changing priorities and strong organizational skills.

Awarded High Five Award in 1st Quarter 2004 for Excellence in Renewal Specification Preparation

Awarded High Five Award in 2nd Quarter 2004 for Outstanding Customer Service Skill - Responsiveness

Senior Staff Underwriter

CYGNET RISK MANAGEMENT INSURANCE - Poway, CA - May 2001 to May 2002

Poway, CA

May 2001 - May 2002

Medium-sized Managing General Agency specializing in the Hospitality Industry.

Senior Staff Underwriter

Underwrote renewal business for multi-line and multi-state accounts including risk assessment, loss analysis, final premiums, quotations, binding and invoicing.

Demonstrated ability to multi-task under tight deadlines and work with multiple priorities.

Commercial Lines Specialist

Large Commercial Lines Company - San Diego, CA - October 1995 to May 2001

specializing in Workers' Comp and EQ coverages.

Commercial Lines Specialist

Managed renewal accounts for multi-line policies including evaluating applications, loss control surveys, loss history and profitability.

Maintained renewal logs, issued policies and endorsements.

Trained new hires in multi-line rating, coding and policy issuance.

Exceeded management processing objective by 100%.

EDUCATION

H & R Block Tax School - Moreno Valley, CA

2006

Certificate in Desktop Support Specialist

Foundation College - San Diego, CA

Business Administration

City University - Seattle, WA

Business Administration

University of Portland - Portland, OR