

Chad Kohorst

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PROFESSIONAL EXPERIENCE

Morgan Stanley, Chicago, IL

Associate – Morgan Stanley Tax Department

March 2010 – Present

- Oversee and manage the tax compliance life cycle of various alternative investment products, including private equity, real estate, and infrastructure funds.
- Support other Morgan Stanley product groups with transaction tax issues, tax planning and consulting, financial tax accounting, and tax audit services.

KPMG LLP, Chicago, IL

Tax Senior Associate – International Tax

November 2008 – October 2009

- Analyze and review international tax compliance work papers and tax returns (Forms 5471, 5472, 8865, 8858, 1118, 1120F, and TD F 90-22.1) for businesses with international operations, including Walton Street Capital, Reynolds Food Packaging, and Motorola
- Assist in preparation of Pre-Filing Agreement (PFA) for the Commonwealth of Australia
- Communicate directly with clients as a primary resource for international tax compliance and advisory work
- Research complex international tax issues such as Passive Foreign Investment Company (PFIC) testing, foreign tax credit planning, and foreign currency exchange issues
- Compose formal business and technical research memos based on completed research utilizing BNA Portfolios, Westlaw, CCH and other online research tools
- Draft responses to Information Document Requests (IDRs) for clients undergoing Internal Revenue Service audits
- Prepare and teach both internal and external training sessions on international tax compliance issues
- Manage and coordinate teams comprised of U.S. and India based staff

Tax Senior Associate – Federal Tax

July 2004 – August 2007

- Analyze and review tax compliance work (Forms 1120, 1120S, 1065, and 990) for large national and multi-national businesses, including ArcelorMittal, Motorola, and Allscripts Healthcare
- Advise clients on a wide assortment of federal, state, and local tax issues, including tax filing requirements, NOL usage, and planning for foreign tax credit and general business credit utilization
- Assist with the review of interim and year-end FAS 109 income tax provisions for domestic and foreign entities
- Communicate directly with clients in order to coordinate the exchange of information necessary for compliance and advisory work
- Consistently work under tight time constraints in order to assist clients in meeting their filing deadlines.
- Educate engagement staff on firm and client tax systems
- Receive extensive training in many areas of tax including corporate, partnership, accounting methods, and FAS 109 calculations

EDUCATION

University of Notre Dame – Notre Dame, IN

Master of Science in Accountancy, Tax Services, May 2004
Cum Laude; 3.8/4.0 GPA

University of Notre Dame – Notre Dame, IN

Bachelor of Business Administration in Accountancy, May 2003
Magna Cum Laude; 3.7/4.0 GPA

Other Post-Graduate Education

University of Washington – Seattle, WA

PhD Program in Business Administration – Accounting
August 2007 – October 2008