

## JULIE WANG

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### **PROFESSIONAL EXPERIENCE**

#### **KPMG LLP | Santa Clara, CA, San Francisco, CA**

##### **Senior Associate, Mergers & Acquisitions, Tax | Dec. 2019 - Oct. 2021**

- Assisted in conducting buy-side and sell-side tax due diligence and advising on tax efficient acquisitions, divestments, and restructurings.
- Reviewed financial models and transaction documents and performed analysis of a client's tax attributes including, tax basis of assets and stock, tax accounting for M&A driven transaction costs and corporate earnings and profits.
- Documented purchase accounting considerations, including a company's tax related financial statement disclosures and uncertain tax positions.
- Identified areas for operational improvements and developed a solution to scale and improve the accuracy of determining a client's taxable income and calculating its effective tax rate.

##### **Senior Associate, Accounting Methods, Credit Services, and Mergers & Acquisitions | Oct. 2018 - Dec. 2019**

- Managed and implemented 3-5 projects simultaneously by coordinating with Partner, Senior Manager, and staff on phases of an R&D credit engagement including initial scoping, engagement letter, information requests, client communications, quality assurance review, deliverable preparation, and deliverable walkthroughs.
- Assisted with managing client engagement staffing, billings/collections, risk management, and ensuring client profitability targets are met.
- Mentored and trained 8 staff members and 4 interns from both a technical and client engagement execution perspective. Delegated work and provided stretch opportunities to staff according to their experience, capabilities, and interests.
- Automated model to calculate qualified wage expenditures using hierarchical employee data and reduced preparation time by 50% by partnering with KPMG's data analytics team to drive Alteryx governance and process definition.
- Implemented solutions to streamline processes for gathering and analyzing employee data from multiple electronic systems (e.g. EquityEdge, ERP systems).
- Redesigned dashboards in a spreadsheet model to distill more granular insights from data through segmenting year-over-year analytics by cost center, region, and employee type, leading to an increase in operational efficiency and improvement of deliverable quality.

##### **Associate, Accounting Methods and Credit Services | Jan. 2017 - Oct. 2018**

- Developed an analytical framework to model tax opportunities and exposures as a part of a proposal to research and analyze the impact of new tax law guidance ("LB&I Directive"). Presented the proposal with 3 alternative strategies to client executive audience which was implemented, resulting in a \$50,000 increase in revenue.
- Coordinated and led interviews with the client's product owners, engineers, scientists and software developers to gather qualitative details and determine whether certain activities met the eligibility and qualification for R&D tax credits.
- Prepared technical memos (e.g. company or technology overview, methodology memorandum) to document project methodology, summarize findings, and substantiate tax credit and qualified activities in accordance with

tax guidelines.

#### **Summer Intern, Accounting Methods and Credit Services | [June 2015 - Aug. 2015](#)**

- Analyzed employee and financial accounting data sets to build models and data visualization dashboards to quantify tax assets, assess tax risks, and model taxable income and cash flow impacts.

#### **SKILLS**

**Technical Tax and Accounting:** US GAAP, ASC 740, R&D Tax Credits, Carve-out financial statements

**Software:** Microsoft Office Suite (Excel, PowerPoint)

**Analytical:** financial analysis, data modeling, data visualization

**Communication:** project management, executive communication, technical writing, cross-functional teams

#### **EDUCATION & CREDENTIALS**

**Bachelors in Business Administration, Accounting | San Jose State University**

August 2012 - December 2016

**California CPA Exam: 4 parts & ethics exam passed**

Licensure upon completion of education requirements (June 2022)

#### **PERSONAL PROJECTS, EXTRACURRICULARS, INTERESTS**

University of Colorado Boulder, Continuing Studies, Introduction to Psychology

Laney College, Multimedia in Journalism