

# ANDY RITZERT

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## PROFESSIONAL SUMMARY

In nearly 6 years of indirect tax compliance roles I have developed into a reliable and accurate tax return preparer, diligent tax researcher, skilled data analyst and enthusiastic problem solver. Excel is my passion and I use my advanced skills for process improvement, workflow automation and showing others how to get the most of this vital tool. I also have an additional 10+ years of experience in general accounting.

## TAX EXPERIENCE

### TAX ANALYST

August 2021 – December 2021

Knight-Swift Transportation, Phoenix AZ

Duties: Filed 40 monthly sales, use and excise tax returns, monthly truck mileage reports, quarterly fuel tax refund claims, and annual unclaimed property reports for all states. Prepared state income tax returns and support workpapers for 12 entities in multiple states. Assisted with Q3 tax provision.

Projects: Automated data import into fuel tax refund workpapers. Consolidated sales tax workpapers.

### SENIOR TAX ANALYST

March 2020 – April 2021

Aimbridge Hospitality, Plano TX

Duties: Filed sales, use, liquor, lodging taxes in 16 states for 79 hotels as 1-person tax dept. Processed over 200 monthly tax returns, plus all month-end JEs, recons, accruals. Research and answer tax questions from hotels and guests. Negotiate payment plans and penalty abatements.

Projects: Fully-automated tax workflow with macros to import hotel data, calculate tax, send and track approval requests, and create GL entries – all within a single workbook. Worked with Internal Audit to become SOC1 compliant. Wrote custom function to retrieve USPS or FedEx tracking info from internet.

### INDIRECT TAX ANALYST II

January 2018 – March 2020

US Foods Inc, Tempe AZ

Duties: Prepared and filed sales, use, excise taxes in 45 states as part of 6-person team. Assisted with property tax filings, month-end JEs and recons, license renewals and unclaimed property. Provided state audit support and analysis. Researched IT purchase taxability and resolved data import errors.

Projects: Created macro to upload tax codes into sales software, cutting data entry time by 50%. Built upload templates to un-complicate CO and AZ returns. Fully automated 1-day manual TN beverage report into a 5-click 1-hour report. Added macros to WA audit file. Helped fix lots of broken macros.

### SALES TAX COORDINATOR

Mar 2016 – Jan 2018

US Foods Inc, Tempe AZ

Duties: Review incoming customer exemption certificates for validity based on state. Conduct audits to calculate credits for tax incorrectly billed. Research tax rates, product taxability, and respond to customer sales tax questions. Work on customer and state projects as needed.

Projects: Proactively developed shortcuts, templates and reports to streamline department workflow and improve customer experience. Created Excel macro to cut audit report steps and processing time by 65%. Created website to share state instructions and fillable forms with sales and credit staff.

## ADDITIONAL ACCOUNTING EXPERIENCE

### BACK OFFICE MANAGER

June 2013 – July 2015

Dollar Mania, Chandler AZ

Back Office Manager responsible for all bookkeeping, payroll, cash handling, HR and staff training.

Researched industry and market to write business plan and all operating manuals. Designed all advertising, web store, social media presence and community marketing and public relations efforts.

**FINANCE MANAGER****August 2007 – June 2010****Desert Pain Institute, Mesa AZ**

Responsible for all accounts payable and general ledger accounting, including financial statements, sales tax and more. Assisted with payroll for 100 employees. Worked with department heads to develop budget, improve cost efficiencies. Added Facility Manager duties starting June 2008.

**ACCOUNTANT (as Contractor)****Accountemps, Phoenix AZ****July 2006 – August 2007****Accountemps, Cincinnati OH****March 2004 – Sept 2004**

Temp assignments as Accounts Payable Clerk for medical office, Staff Accountant for online retailer, Accounting Clerk for dental office, Bookkeeper for apartment complex, Accounting Coordinator at non-profit social service agency, IT Security Analyst at large midwestern bank. Duties included filing, accounts payable, check runs, daily deposits, bank recs, collections and assisting with payroll.

**GENERAL ACCOUNTANT****Sept 2004 – June 2007****PC on Call, Cincinnati OH**

Full-cycle accounts payable, extending and monitoring customer credit lines, office supply ordering, reconciling accounts, filing sales tax, employee expense reporting, and managing fixed assets.

**EXCEL SKILLS AND EXPERIENCE**

Expert in all facets of Excel including VLOOKUP, dynamic arrays, PivotTables, macros, Power Query, Power Pivot and creating complex formulas and workbooks. My history of sharing and teaching is listed below.

2018-2020 Developed 10 1-hr live webinars and support files for US Foods Finance Training Program

July 2019 Led 4 (2 beginner, 2 advanced) live trainings with US Foods Miami, FL sales support teams

June 2019 Created "[Excel Cheat Sheet](#)" of favorite shortcuts/tips. 990k views on LinkedIn as of Feb 2022

Sept 2018 Worked with Internal Audit and Payroll Department to automate bonus calculation workbook

2012-2022 Frequent contributor to Excel groups, and I regularly share Excel tips on my LinkedIn page

2004-2005 Taught Excel and Word at Cincinnati Union Bethel's non-profit Adult Learning Center

**SOFTWARE PROFICIENCY**

Sales and use tax via Sovos TaxSolver, Vertex O Series

Income Tax via CorpTax

Property tax via OneSource

Tax Research via Checkpoint, TTR

Exemption certificate management via Avalara

Accounting via JD Edwards, Peoplesoft, Great Plains, Ivalua, QuickBooks

Collaboration via Teams, Skype, Zoom, OneNote, SharePoint, Outlook

Data Analysis via Excel (including PowerPivot and macros), SQL, Alteryx, Horizon, Hubble, Snowflake, AWS

**CREDENTIALS**

Western Governors University

Bachelor of Science in Accounting (*currently attending*)

Graduation expected 2022

Cincinnati State Technical and Community College

Associates Degree in Accounting

Graduated June 2006

Associates Degree in Business Administration

Graduated August 2004

Certified Microsoft Office Specialist - Excel 2013, 2016