**Anthony White**

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**Education:**

EasternCT State University **2004 BA/Business: GPA 3.6**

University Of Hartford **2007 MBA/Taxation: GPA 3.7**

**Accomplishment:**

1. Achieved in excess of $4,000,000 in tax revenue from tax delinquent accounts.
2. Sphere headed migration of new financial Data system (ITAS) for entire state of Connecticut
3. Cross training of tax staff, resulting in 100% increase in department productivity

**Areas of Expertise:**

* W2,1099,1120 Federal returns, 1065 returns, Trust and Estates, Property Tax, Tax Form 706, Sin Taxes, Tax Liability Computation, Estimated Tax payments, 2210 Interest, Credit to other jurisdiction
* Financial Software: Global Max, Onetis, Bloomberg, ITAS, ITRP, MBDB, Great Plains.
* Individual Income Tax Returns (7yrs), Federal Income Tax Returns (7yrs), Business Tax (7yrs).
* Microsoft Office: Excel (Vlookup, Hlookup, Pivot tables, text to columns)
* QuickBooks
* ONQ (hotel application)

**Work Experience:**

**Franklin Templeton Investments,** FT Lauderdale FL

**SR Tax Accountant** January 2011 – Present

* Overseeing, reviewing and accepting ultimate responsibility for all aspects of the 1040 tax returns for high net worth clients.
* Participating in tax planning and strategy for our clients that minimize their tax liability regarding trusts, estates, gift planning, charitable planning, college funding, etc.
* Assisting in complex tax research and planning projects for high net worth clients
* Interpreting the applicable tax code and regulations
* Working closely with Portfolio Managers, Trust Administrators and Estate Administrators to offer tax solutions.

**Connecticut Department of Revenue Services**, Hartford CT

**SR Tax Analyst**  March 2008 – December 2010

* Supervise tax staff.
* Oversee quarterly billing, collection and adjustment of taxes
* Review and make correct adjustments on sales and use tax returns.
* Calculate tax credit for taxes paid to other jurisdictions.
* Review CT K-1’s and credit tax payers with Withholdings from K-1.
* Maintains income tax and business tax accounts receivable including preparing and processing billings
* Transfer large sum payments (excess over $1million for the year) from incorrect social security number to correct social security number, and explain in detail the course of action.
* Coordinate monthly billing distribution cycle for all state taxes.
* Calculated estimated tax payments for sales and use Tax corporations that were assessed 2210

**Tax Analyst**  August 2005 – March 2008

* Review and correct Trust Returns (1041), Corporate Returns (1065), and apply CT K-1 to non-residents tax payers.
* Review and make adjustments on income tax bill for refund accounts.
* Contact tax payers, accountants, and tax attorneys to discuss and resolve complex business tax liabilities.
* Receive over 200 calls daily from tax payers, and help resolve related tax issues.
* Calculated estimated tax payments for Connecticut residents
* Assign income tax work to section employees, review work of section employees

**Travelers Insurance**, Hartford CT

**Tax Accountant** March 2003 – August 2005

* Keeps abreast of new tax legislation and developments and communicates such changes to the compliance Director of Taxation.
* File monthly, quarterly, and annual Insurance Premium Tax Returns and payments.
* Analyze expense invoices to determine if taxable.
* Research and analyze tax questions/issues.
* Ensure state, federal tax filings are accurate and timely by validating deposits, reconciling quarterly and annual tax filings and auditing the vendors as necessary.
* Respond to tax notices in an accurate and timely manner.

**Eastern Connecticut State Universit**y, Willimantic CT

**Payroll Analys**t May 2001 – January 2003

* Responsible for processing bi-weekly payroll.
* Reviews employee times accuracy and completeness and enters data.
* Respond to employee request regarding payroll changes, insurance, and attendance.
* Auditing invoices or payments for accuracy and compliance with state regulations.
* Calculates and process retroactive payments; convert all pay and codes into financial data system according to deadlines.

**Special Assignments**

**Consumer Representative (Tax Payer Services**); in this capacity as Product Expert, I facilitated numerous income tax workshops to Connecticut Residents during tax season with attendance over 300. During these workshops, CT Residents were informed of any changes and new regulations regarding federal and state statues and amendments. I also establish dialog with professional Accountants, Attorney, and Government officials pertaining to Income Tax Returns, Corporations Returns, and Sales Tax Returns.

**Revenue Agent (Collections)**; in this capacity I contacted debtors or lottery agents to secure full payment; locates tax debtors or lottery agents and levy sources. Identify accounts which require issuance for warrant, hearing, abatement or attorney action.

**Associate Revenue Processo**r; in this capacity as a supervisor I provided staff training on complex computer input problems involving amended tax returns, penalty waivers, tax warrants, multi-step adjustments and processing problems within financial departments