GREG CHENGGAO FENG, Ph.D., FRM, EA

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SUMMARY OF QUALIFICATIONS

Experienced finance, accounting, and tax professional with a record of documented achievement and measurable performance in accounting, finance, and data science. Strategic leader committed to providing best-in-class financial risk modeling, client advisory services, auditing, tax planning and research, tax preparation delivery, and virtual logistics support. Seasoned value contributor with impeccable ethics and integrity. Strengths include:

- Digital Transformation and Automation
- Customer-Centric Relationship Management
- Individual, Entity and Business Taxation
- ASC 740 Accounting for Income Taxes
- Integration/Implementation of Tax Solutions with ERP System
- SAP FICO, SAP S/4HANA Finance
- Apache Spark/PySpark Big Data Technology
- Programming in C/C++, Java, JavaScript, Python, R, and SAS
- Drake Tax, Turbo Tax, BlockWorks Online, QuickBooks Online
- Audit Analytics
- Quantitative Finance, Excel VBA
- Data Analytics and Machine Learning
- Intelligent Enterprise Technologies
- SAP Fiori and ABAP Programming
- SAP Business Technology Platform
- Azure Databricks Platform
- Dashboards and Business Insights
- SQL and Database Technology

LICENSES / CERTIFICATIONS

- Enrolled Agent (EA)..................................Internal Revenue Service (IRS)
- Registered Maryland Tax Preparer............Maryland Board of Individual Tax Preparers
- Registered New York Tax Preparer............New York State Department of Taxation and Finance
- Financial Risk Manager (FRM)................Global Association of Risk Professionals
- Advanced SAS Programmer.....................SAS Institute

AWARDS / HONORS

- "Virtual Tools Champion. The Tax Transformation Team wants to recognize Chenggao Feng for being a Top Performer for the month of March."   Amy W., Vice President of Tax Transformation

- "It's hard to believe it's only been a year since you started serving clients at Block … you really stepped up … quickly achieving your tax certification and completing 158 returns - this is an impressive accomplishment for any associate, particularly someone in their first year. Way to go! You are tranforming clients' lives."
  "Greg, you were such an important part of our team this year! Thank you for everything you did - for clients, your peers and H&R Block!"

  Karen O., President   Bob M., Senior Vice President

PEROFESSIONAL EXPERIENCE

Master Tax Advisor   H&R Block, Gaithersburg/Germantown MD   Dec. 2022 to present

- Reviewed, analyzed, and reconstructed clients' financial statements including balance sheet, income statement, and statement of cash flow.
- Provided and documented detailed review and analysis for every tax return.
- Evaluated, interpreted, and assisted clients with all adjustments, credits, and deductions.
- Worked closely with clients, answered their questions, and collected necessary documents for tax service requirements. Negotiated favorable arrangements with the IRS for clients.
- Advised and collaborated with clients for their strategic tax planning activities.
- Represented clients before the taxing authorities (both the IRS and the Comptroller of Maryland).
- Identified and referred tax planning and consulting opportunities to management and leadership.

Senior Tax Analyst   H&R Block, Germantown, MD   Dec. 2021 to Nov. 2022

- Prepared, reviewed, analyzed, and delivered complete and accurate individual and entity tax returns.

- Conducted client interviews, collected necessary tax information, and efficiently performed e-file or paper file actvities.
- Advised, managed, conducted, and communicated tax research findings and conclusions to clients.
- Planned and assisted the business development with small business owners.
- Served, advised, and provided support and solutions to clients with their income tax audits.
- Performed tax office opening, closing, cash deposits, and other pertinent tax preparation activities.
- Prepared and reviewed accounting for income taxes in accordance with ASC 740.

Chief, Analytics   PDSLab LLC, Gaithersburg, MD   2017 to present
- Accelerated and directed Probability of Default and Loss Given Default modeling activities on consumer loan and residential mortgage loan portfolio data.
- Archived and created database tables for mortgage data through financial data engineering principles.
- Provided data analytics for intelligent enterprise resources management and modeling.
- Assisted and delivered accounting bookkeeping activities through SAP Finance platform and technologies.
- Integrated PySpark data analytic workflows with clients' streaming data services.
- Developed and documented pre-payment modeling activities on consumer loan data.

Quantitative Analyst   PenFed Credit Union   2010 to 2018
- Trained and developed staff members on Current Expected Credit Losses modeling, procedures, and add-ons.
- Served as subject matter expert on risk modeling. Managed allowance for loan and lease losses provisioning process. Implemented models that capture portfolio risk profiles and economic conditions.
- Constructed and managed model output database tables from the allowance for loan and lease losses processes.
- Performed and developed data models for annual CCAR regulatory data submission procedures and activities.
- Managed and coordinated with internal audit and external audit personnels for quarterly auditing activities.
- Supervised and managed third parties financial model development, testing, and validation activities and processes.
- Delivered and made significant contributions to credit loss forecasts and budgeting process.

Manager, Risk Modeling   PenFed Credit Union   2003 to 2010
- Mentored, coached and advised team members on performance, career development, and financial risk modeling techniques.
- Managed and owned balance sheet management procedures and activities. Monitored risk positions and profiles. Updated balance sheet timely with current forecasts. Provided dashboard reports to management on score card performance and key operating indicators.
- Collected pertinent data and developed models for annual financial planning and budgeting activities.
- Developed complete consumer loans underwriting system from selection criteria, business logic, and workflow models to credit decisioning engine development. Collaborated with IT support and put the system into production.
- Created, owned, and managed Customer Relationship Management database tables.

EDUCATION
- Ph.D. in Statistics .... University of Wisconsin-Madision
- B.S. in Mathematics .... Shanxi Normal University, China