

Max Coursey

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EXPERIENCE

Aprio, LLP, Senior Tax Manager

2018 - 2019

- Oversee team (15+) in the analysis and delivery of R&D tax credit projects within the software, consumer product, engineering, and manufacturing industries (*including local sports team*)
- Perform engineering based and tax technical quality review assessing the merits of studies and the risk of positions taken based upon existing tax authority
- Lead firm's implementation of new technology - providing innovation ideas and practices in the areas of process automation tools (*RPA*), business intelligence (*BI*), data analysis engines
- Effectively manage relationships and financial metrics of portfolio of clients for projects with credits

Grant Thornton, LLP, Tax Director

2014 - 2018

- Lead southeast regional sales and team management for healthcare, real estate and engineering focused projects for software, construction, and consumer product industry sectors
- Perform project management and tax technical review for large fixed asset (*i.e. repairs*) analyses, cost segregation, misc. tangible property regulations implementation, book/tax fixed asset outsourcing, and R&D tax credit engagements
- Manage and maintain client sales pipeline - annuity (\$1.35M) and white-space (\$1.0M)

Cherry Bekaert, LLP, National Specialty Projects Manager/Leader

2012-2014

- Lead management of firm-wide team, process, and sales pipeline (*manufacturing/consumer products consulting, construction analysis*) for tax fixed asset and R&D tax credit projects
- Develop new statistical sampling process for repairs and R&D credit projects from scratch
- Responsible for all project management including initial scoping, budgeting, project planning and control, delivery, internal software/tool development, and internal training

Ernst & Young, National Tax

2007- 2012

- Provide project management, detailed technical engineering (*including construction estimation/valuation techniques*), and legal analysis for large public corporation specialty tax projects
 - Tax fixed asset review for some of the largest private construction projects in the US (*e.g. multifamily, industrial, gaming, manufacturing*)
 - R&D tax credit project management - documentation, interviews, calculation, form prep
 - SE region liaison for tax technology department development of SQL database tools

EDUCATION

Georgia State University, MBA

Georgia Institute of Technology, BS, Environmental Engineering

ADDITIONAL SKILLS/INVOLVEMENT

Enrolled Agent, RS Means, Marshall & Swift, Microsoft Power BI Suite (Power Query/Power Pivot), Microsoft Flow, SharePoint, Microsoft Teams, SQL Development, MS Office Expert, Statistical Modeling & Research, Frequent Presenter/Trainer on Tax Law and Technological Tools, Atlanta Humane Society