

LISA ROBERTS

Tax Manager

Contact Information:

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Location: Memphis, TN

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PROFESSIONAL SUMMARY

Senior accounting professional with 6+ years of progressive experience in financial management, team leadership, and strategic planning. Proven track record of driving process improvements, reducing costs, and leading successful financial initiatives. Strong expertise in complex accounting principles and regulatory compliance.

TECHNICAL SKILLS

- Corporate Tax
- Tax Compliance
- Estate Tax
- Partnership Tax
- Tax Planning
- Gift Tax
- Tax Research
- Audit Defense

SOFTWARE PROFICIENCY

- SQL
- Access
- Payroll Software
- SAP
- PowerPoint
- Tax Software

PROFESSIONAL EXPERIENCE

Senior Manager | Elite Business Solutions | 2021 - Present

- Led financial reporting and analysis for \$50M+ revenue company
- Managed month-end closing process and prepared financial statements
- Collaborated with cross-functional teams on strategic initiatives
- Implemented process improvements resulting in 20% efficiency gains
- Mentored junior staff and provided training on new procedures

Audit Manager | Regional CPA Firm | 2020 - 2021

- Prepared monthly financial reports and variance analysis
- Processed journal entries and maintained general ledger
- Assisted with budget planning and forecasting processes
- Reconciled bank statements and credit card accounts
- Supported audit preparation and documentation

Internal Auditor | Excellence in Finance | 2019 - 2021

- Prepared monthly financial reports and variance analysis
- Processed journal entries and maintained general ledger
- Assisted with budget planning and forecasting processes
- Reconciled bank statements and credit card accounts
- Supported audit preparation and documentation

EDUCATION

Master of Science in Taxation

UCLA | 2021

GPA: 3.8/4.0

ACHIEVEMENTS

{generate_achievements(experience_years)}

REFERENCES

Available upon request