

Steven Levy, CPA, J.D.
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EDUCATION:

Eleven Fifty Academy, Indianapolis, IN
Web Development Student, March 2021-Current
Programming Learned – HTML, Javascript, CSS, Bootstrap, Formspre

New York Law School, New York, NY
J.D. 1997; Top 1/3 ranking in class- 3.0 GPA
Activities: Coordinator – IRS Volunteer Income Tax Assistance - 4 years
Internship – Internal Revenue Service Criminal Division

Indiana University, Bloomington, IN
B.S. Accounting, 1993, B.M. Vocal Performance, 1993
Honors: Dean's List, C.P.A. since 11/1994

EXPERIENCE:

FOUR QUADRANTS ADVISORY, Carmel, IN
Tax Manager, August 2018-Current
Head of Accounting Department specializing in accounting and tax for the dentistry industry. Assisted in helping obtain government funding for several multi-state clients.

DAUBY O'CONNOR & ZALESKI, Carmel, IN
Senior Tax Manager, October 2013- July 2018
Key member of 40-person tax department of national firm that handles over 3,000 tax returns annually with firm that specializes in real estate tax and the affordable housing industry.

DONOVAN CPAs, Avon, IN
Senior Tax Manager, November 2009-October 2013
Was in charge of all tax matters with largest CPA firm in Hendricks county, including review of all corporation, partnership, nonprofit, and individual returns, tax controversy, and research.

TITUS CONSULTING, Indianapolis, IN
Tax Manager, June 2009-October 2009
Assisted a Fortune 500 company with federal, state, and international compliance matters and tax accounting issues, including IFRS analysis and quarterly/annual FAS109 reports.

KATZ SAPPER & MILLER, Indianapolis, IN
Tax Manager, April 2008 - April 2009
Performed tax technical review of various entity and individual tax returns. Performed quarterly and annual FAS 109 reviews for large multi-national companies. Was main expert within the firm for the R&D credit, domestic production deduction (DPD), and environmental incentives.

JEFFERSON WELLS, Indianapolis, IN
Tax Professional, June 2007 – April 2008
Served as tax compliance manager for Fortune 500 company, including reviewing and filing of consolidated federal, state, and international returns and estimates, as well as FAS109 preparation and review. Performed FIN 48 study for public utility, and DPD procedures review for a Fortune 500 company. Conducted SOX testing of tax process for multinational company.

KELLEY HARDESTY SMITH & CO CPAs, Indianapolis, IN

Tax Compliance Officer, November 2004 – June 2007

Was in charge of all tax affairs of the firm, including technical tax reviews of all entity tax returns, tax research, tax audits, and tax education for other firm CPAs. Performed tax planning involving client structure, ownership transition, and various other tax saving projects.

ERNST & YOUNG LLP, Indianapolis, IN

Tax Manager/Specialist, June 1997 – November 2004

Prepared federal and state consolidated tax returns for large corporate clients.

Researched and addressed questions related to various federal, state, and international corporate tax issues. Implemented several federal tax saving projects, especially related to the research and development tax credit. Prepared and reviewed specialized individual returns and equalization statements for expatriates/inpatriates, and provided tax saving solutions and research for international human resource departments.

OTHER :

Am a licensed attorney in Indiana and Illinois. Am a licensed CPA in Indiana.