1. Interviewed students to gather important tax-related information, including taxable income, deductibles and allowance information.
2. Helped clients navigate interactions with tax authorities and legal concerns related to financial matters.
3. Conducted detailed technical and analytical review of federal/state corporate, partnership and S corporation tax returns, FAS 109 provisions, and quarterly estimates prepared by associates.
4. Strengthened financial management processes to bring errors to near-zero in reporting, payroll administration and general bookkeeping.
5. Completed daily cash functions like account tracking, payroll and wage allocations, budgeting, donating and all types of cash and banking reconciliations.
6. Reconciled accounts and reviewed all materials, including surplus, income, expense data, net worth and assets.
7. Followed up with customers to collect specific financial information and verify details for preparation of annual 1095 forms.
8. Tracked financial progress by creating quarterly and yearly balance sheets.
9. Collected and arranged financial information and entered details into [Software] financial management system.
10. Maintained up-to-date knowledge on permits, certificates and documents mandatory for government departments.
11. Set up and improved accounting systems and processes to meet business needs and maximize effectiveness of operations.
12. Evaluated and improved accuracy and completeness of [Type] financial records to boost regulatory compliance.
13. Modified comprehensive financial reporting package to reflect growing organizational complexity.
14. Improved efficiency of operations, including data collection, analysis and modeling, to enhance practices and increase customer retention.
15. Maintained full [Area of expertise] compliance for [Type] business turning over $[Amount] in revenue per year.
16. Created budgets and forecasts for management group in alignment with accounting deadlines.
17. Proactively researched technical tax issues related to consulting projects.
18. Supported monthly reporting analysis to achieve validation of internal reports and to reconcile production operations and general ledger.
19. Partnered with auditors on annual audits and realized compliance with governmental tax guidelines.
20. Prepared documents, reports and presentations for executives and board members using advanced software proficiencies.