First Last

Accomplished senior tax professional with over 20 years of accounting experience. Offers extended expertise in Fiduciary and Trust taxation. Able to work independently as well as in large groups with diverse teams. Effectively participates in team member activities that help develop a productive work environment. Goal-oriented and dedicated to high levels of customer satisfaction. Holds B.B.A. in Accounting.

- Prepare large range of tax returns for high-net-worth trusts and estates.
- Prepare quarterly projections for high-net-worth clients to ensure estimates are being paid and filed properly.
- Mentor, train staff/team members, and new hires.
- Facilitate various tax projects, including drafting, and present policies and procedures to clients to comply with tax legislation.
- Prepare federal and state fiduciary tax returns for trusts (Form 1041) and estates (Form 1041) and charitable trusts (Form 5227).
- Prepare tax extensions for Forms 1041.
- Research various state tax rules, regulations, and deadlines using official state government websites
- Perform research for tax authorities and IRS to resolve outstanding tax issues.
- Participate in various tax projects throughout the year.
- Review government documents of different complexity.

PROGRAMS | SOFTWARE
Government Websites ~ OneSource ~ Checkpoint ~ QuickBooks ~ CCH

SKILLS
Financial Accounting ~ Tax Preparation ~ Tax Accounting ~ Financial Reporting ~ Account Reconciliation ~ Fiduciary Services ~ Income Tax

Senior Fiduciary Tax Analyst

Fiduciary Tax Services

Company Name
Address
City, ST Zip Code
Phone Number
Email Address

INDUSTRY LINES:
- Fiduciary Tax Services

EDUCATION:
- B.B.A., Accounting, 12/2012

CERTIFICATION(S)
- Enrolled Agent
- 150 cr. hrs. for CPA exam
- Certified QuickBooks User

Fluent in English, Spanish, and Romanian.