

James Smith

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SUMMARY OF QUALIFICATIONS

- Accounting professional with 10+ years working with public accounting firms and corporate tax departments; experience in federal and state income tax returns for trusts, tax exempt entities, partnerships, corporations and individuals and filing of form 1042, 1042S and 1099.
- Great knowledge in researching and documenting tax consequences of transactions, developing and implementing tax strategies and representing clients in IRS and various state government tax audits.
- Self starter and can work as a team member or independently to accomplish company objectives.
- Strong communication skills, oral and written; ability to communicate with all levels within the organization and with outside administrators and consultants as needed.
- High level of organizational skills and ability to prioritize, handle multiple projects at a time and meet multiple deadlines in a fast paced environment.
- Advance skill level with Excel, proficient with Word, research and tax software such as CCH Pro-System and tax software such as OneSource TrustEase, GoSystem and Lacerte and familiar with Trust Accounting software including SunGard and Metavante.

EXPERIENCE

ABC Corporation 01/2009- present

Tax Accountant

- Federal compliance, review, and preparation of corporation, insurance, partnership and private foundation tax returns.
- Accounting for income taxes in accordance with FAS 109, current/deferred tax analysis, and journal entries for numerous insurance and non-insurance subsidiary provisions.
- Maintain standards for Sarbanes-Oxley 404 and FIN 48 compliance.
- Coordinate with fixed asset accountant the necessary information for correct tax depreciation calculations, review tax depreciation calculations and schedules for accuracy.
- Analyze accrual accounts for deductibility pertaining to the provision and tax return.
- Assist in the completion of the tax footnotes for the annual statements.
- Identify reportable transaction disclosures for consolidated tax return.
- Prepare tax filings for new entities, dissolutions and liquidations.
- Prepare and maintain basis calculations for partnerships.
- Maintain database and contact information to verify all K-1's are received for the tax returns.
- Assist with audit requests, research and implementation of tax consequences.
- Participate in the implementation of new provision, fixed assets, and ERP systems

DEF Incorporated 6/2004-4/2008

Sr. Tax Accountant

- Responsible for preparing and timely filing sales and use tax returns for **42 States** using **VERTEX Tax Solutions**.
- Updating tax RATES and GEO codes in Vertex database on monthly basis.
- Strictly monitoring tax matrix index by product line for taxability.
- Complied with new tax laws changes on regular basis.
- Maintained a proper system for renewing business licenses for various states.
- Maintained monthly tax calendar for keep track of filing for states and local returns.
- Handled sales and use tax auditors from various states time to time.
- Prepared and paid quarterly federal and franchise estimate tax.
- Responded to all the tax notices and other queries from various states in timely manner.
- Prepared balance sheet recons for sales tax payable account.
- Responsible for maintaining **FIXED ASSETS** using **FAS systems** for fixed asset.
- Maintained a proper procedure of internal controls for fixed assets as per company policy.
- Reconciled the sales and use tax accounts with general ledger for all the states.
- Reconciled the rollover account of fixed assets and lots of other balance sheet accounts.
- Filed and prepared property tax return 571-L on yearly basis.

GHI Company 11/2001-4/2004

Senior Tax Accountant

- Preparation of 1041 tax returns.
- Preparation of 990 tax returns.
- Preparation of 1065 partnerships.
- Represent client as POA with IRS issues.
- Assist staff with preparation of tax returns.
- Full communication with tax clients.
- Preparation of tax returns for high-net worth individuals with multi-state filings.
- Preparation of tax returns for clients from foreign countries.
- Prepare amended tax returns for both individuals and businesses.
- Review individual tax returns.

EDUCATION

Certified Public Accountant, CPA

DEPAUL UNIVERSITY

Pursuing a degree in Master of Taxation.

INDIANA UNIVERSITY AT BLOOMINGTON

Bachelor of Science in Accounting with a GPA of 3.5/4.0.

TECHNICAL PROGRAMS

- Tax software including GoSystem, Pro-System (CCH) and Insource, OneSource Trust Tax system, Lacerte; research software including RIA, CCH and Lexis and accounting software including: Platinum and QuickBooks.
- Microsoft applications including Word, Excel, Powerpoint, Outlook and Windows 95/98/XP.