

Tax Preparer

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SUMMARY

Reliable tax preparer with five filing seasons completing 600-plus individual and small-business returns, holding an active PTIN, fluent in Drake and Lacerte, and committed to accurate, IRS-compliant filings and steady client retention.

EXPERIENCE

Tax Preparer, Evergreen Tax & Advisory

2021 – Present

City, ST

- Prepared and e-filed 620 individual and small-business returns in the most recent season, including 1040, Schedule C, and 1120-S filings.
- Maintained a 99% e-file acceptance rate by reviewing each return against IRS validation rules before submission.
- Identified credits and deductions that lowered client liability, averaging \$1,400 in additional savings per qualifying return.
- Retained 92% of returning clients year over year through accurate work and clear, proactive communication.
- Conducted detailed client interviews to gather documentation and verify eligibility for credits.
- Resolved three IRS notices on clients' behalf, preparing responses that closed each without penalty.
- Completed 18 hours of continuing education annually to stay current on tax-law changes.
- Mentored two seasonal preparers on Drake workflows and quality-review standards during peak season.

Seasonal Tax Associate, Hometown Bookkeeping & Tax

2019 – 2021

City, ST

- Prepared roughly 240 individual returns per season under the supervision of an enrolled agent.
- Entered W-2, 1099, and deduction data into ProSeries with a sub-2% rework rate on review.
- Reconciled client-provided records to source documents before beginning each return.
- Calculated estimated quarterly taxes for 30 self-employed clients to avoid underpayment penalties.
- Scheduled appointments and managed the client document-intake queue during the filing rush.
- Filed extensions accurately for clients needing additional time, tracking each to completion.

EDUCATION

Bachelor of Science in Accounting

2015 – 2019

State University — City, ST

CERTIFICATIONS & LICENSES

IRS Preparer Tax Identification Number (PTIN) · Enrolled Agent (EA)

SKILLS

Individual tax returns · Small-business returns · Drake Tax software · Lacerte and ProSeries · Tax credits and deductions · IRS compliance · Client interviewing · Estimated tax calculation · IRS notice response · Recordkeeping accuracy · Continuing education · Confidentiality