



Phone: (555) 234-5678

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EXPERTISE SKILLS

- tax preparation
- client education
- compliance
- record-keeping
- teamwork
- communication

LANGUAGES

- English
- Spanish
- French

CERTIFICATION

- Bachelor of Science in Accounting, University of Florida, 2019

REFERENCES

John Smith

Senior Manager, Tech Corp
john.smith@email.com

Sarah Johnson

Director, Innovation Labs
sarah.j@email.com

Michael Brown

VP Engineering, Solutions Inc
mbrown@email.com

MICHAEL ANDERSON

INDIVIDUAL TAX ADVISOR

Proficient Tax Filing Specialist with a solid foundation in individual tax preparation and planning. Possesses a keen eye for detail and a thorough understanding of tax preparation software. Demonstrated ability to work effectively under pressure, ensuring timely and accurate submission of tax returns. Committed to providing exceptional client service and fostering long-term relationships.

PROFESSIONAL EXPERIENCE

NextGen Tax Services

Mar 2018 - Present

Individual Tax Advisor

- Provided tax preparation services for individual clients, ensuring compliance with IRS regulations.
- Identified and implemented tax-saving strategies, resulting in an average of 20% savings for clients.
- Educated clients on tax implications of various financial decisions.
- Maintained meticulous records and documentation for all tax filings.
- Participated in training sessions to stay current with tax law changes.
- Achieved a client satisfaction rating of 97% for two consecutive years.

Local Tax Advisors

Dec 2015 - Jan 2018

Tax Preparation Intern

- Assisted in the preparation of tax returns for individuals and small businesses.
- Conducted preliminary tax interviews to gather necessary client information.
- Supported senior advisors in tax research and compliance efforts.
- Monitored tax deadlines and ensured timely submissions.
- Developed client communication materials to enhance understanding of tax processes.
- Received commendation for outstanding performance during the internship.

ACHIEVEMENTS

- Achieved a record number of client referrals in 2022, increasing the client base by 25%.
- Recognized for outstanding internship performance with a full-time job offer.
- Contributed to the development of a client satisfaction survey, improving feedback mechanisms.