

# JASON BROWN

**Address:** P.O. Box 888 Winfield, Illinois 60190 **Phone:** 888.888.8888 **Email:** resumesample@gmail.com

## INTERNAL REVENUE AGENT

*Department of the Treasury–Internal Revenue Service*

JOB ANNOUNCEMENT NUMBER: **20PHI-LBX0145-0512-13**

CITIZENSHIP: **U.S. CITIZEN**

PAY SCALE & GRADE: **GS 13**

### QUALIFICATIONS PROFILE

Competent, analytical, and goal-oriented professional, with extensive experience in accounting, financial analysis, tactical planning, and client relations in the private industry and public accounting sector. Knowledgeable of tax laws, forms, and instructions as well as in state statutory laws, forms, and local procedure. Armed with strategic thinking and problem-solving skills to attain outstanding results.

### COMPETENCIES

#### Corporate Financial Transactions

- Evaluated direct reports to complete loan portfolio bookkeeping and recordkeeping on time
- Monitored the maintenance of Sage 100 SMI report templates and the integrity of 401(k) benefit plan financial data
- Met with the board of municipal government officials to discuss all financial results
- Relayed the financial results report of the US branch operations to all foreign parent

#### Problem Solving

- Effectively offered outstanding solutions to all client concerns and problems
- Facilitated client meetings to address their questions, offer tax advices, and establish relationships

#### Tax Law and Practices

- Provided expert tax advices to clients
- Conducted evaluation of staff and self-preparation of individual tax returns to ensure accuracy and client documentation support of the amount listed
- Prepared corporation, partnership, s-corporation, non-profit, and fiduciary income tax returns

### PROFESSIONAL EXPERIENCE

#### JONATHAN GRUBB, CPA, PC DBA GREAT LAKES ACCOUNTING

*208 East Montezuma Avenue Suite 2, Houghton, MI 49931*

**President** • Jun 2016–Dec 2019

Supervisor: N/A

Hours per Week: 55  
Annual Salary: \$95,000

- Guaranteed the consistent and timely completion of payrolls by organizing, overseeing, and assessing the staff performance
- Performed extensive promotion of the firm's presence by ensuring active community involvement, establishing awareness, and creating networks
- Conducted new client onboarding in accounting software packages, mainly QuickBooks
- Facilitated client meetings to address their questions, offer tax advices, and establish relationships
- Evaluated the staff and self-preparation of individual tax returns for the verification of accuracy and logic as well as to ensure the client documentation support of the amount listed
- Took charge of preparing corporation, partnership, s-corporation, non-profit, and fiduciary income tax returns while creating correspondences to tax authorities on behalf of clients
- Supervised, hired, rewarded, and terminated all staff members as needed

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- Adhered to the quality and presentation of client deliverables based on firm and market standards
- Rendered oversight to the execution of organizational performance; and guaranteed quick response to all events outside the scope of others' duties
- Made decisions and exercised authority over matters of judgment and in conditions of ambiguity

## CAP SERVICES, INC.

2900 Hoover Avenue Suite A, Stevens Point, WI 54481

**Deputy Chief Financial Officer** ▪ May 2015–Jun 2016

Supervisor: Susan Henry, CFO

Hours per Week: 45

Contact No.: Do not contact

Annual Salary: \$69,000

- Carried out month-end closure for economic development loan portfolio and prepared reports based on the Housing and Urban Development (HUD) guidance
- Handled and analyzed all direct reports to ensure on-time completion of loan portfolio bookkeeping and recordkeeping
- Assumed tasks in maintaining Sage 100 SMI report templates and the integrity of 401(k) benefit plan financial data
- Conducted coordination of audit with outside auditors
- Handled the accounting functions for the company's non-profit lending portfolio of housing, auto, and development loans
- Discussed the financial results to the board of municipal government officials

## SENTRY INSURANCE, INC.

1800 Northpoint Drove, Stevens Point, WI 54481

**Accountant–ERP Database** ▪ Mar 2013–May 2015

Supervisor: Lynn Nelson

Hours per Week: 45

Contact No.: May be contacted

Annual Salary: \$62,000

- Used Microsoft Excel in reconciling transaction-level detail between unlinked databases
- Established uniformity in data exports by arranging large datasets of transactions in Excel
- Oversaw the maintenance of all PeopleSoft general ledger account setups, flags, qualities, and other field codes as needed by department end users
- Ensured the correct monthly journal entries by users along with the complete scheduled allocation and closing processes by monitoring the month end close process
- Reviewed all cost allocations among different allocation bases as well as presented the impact of change in base or in percentage on segment-level profit and loss results
- Led several iterations in a test environment of diverse cost allocation set-ups in creating annual budget, conducting modifications, and confirming the rationality of test results

## POPPE & POTTHOFF ARTEC, GMBH

700 Creel Drive, Wood Dale, IL 60191

**Senior Accountant** ▪ Jun 2011–Mar 2013

Supervisor: Julie Lotesto-Smith

Hours per Week: 40

Contact No.: May be contacted

Annual Salary: \$50,000

- Served as the primary point of contact for the financial results report of the US branch operations to all foreign parent as well as documentation for local financial statements into parent's SAP execution
- Documented the month-end journal entries for the monthly close and handled contract revenues by using the percentage of completion method of accounting
- Extensively used the accounting enterprise resource planning (ERP) system as troubleshooting contact for other end users
- *Directed the implementation of cycle count function within ERP, thus minimizing audit variances in inventory accounts*

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## EARLIER CAREER

### JONLYN & ASSOCIATES

1776 South Naperville Road #206a, Wheaton, IL 60189

**Accountant** • Jul 2006–Aug 2009

Supervisor: John Pezzullo

Contact No.: Do not contact

Hours per Week: 42

Annual Salary: \$32,000-36,000

## EDUCATION

**Master of Business Administration, with Concentration in Finance and Marketing** • May 2011

University of Illinois at Urbana Champaign, Urbana, IL 61820

GPA: 3.77

**Bachelor of Arts in Economics, Minor in Accounting, Cum Laude** • May 2006

North Central College, Naperville, IL 60540

GPA: 3.5

**Transfer Credits, Community College** • May 2004

College of DuPage, Glen Ellyn, IL 60137

GPA: 3.5

**High School Diploma** • May 2006

Homeschooled

## LICENSES

**Certified Public Accountant (CPA), State of Illinois** • Valid Until: Sep 30, 2021

**Internal Revenue Service (IRS) Enrolled Agent**

**Registered Investment Advisor: Series 65: Uniform Investment Adviser Law, Financial Industry Regulatory Authority (FINRA)**

## PROFESSIONAL AFFILIATION

Member, Illinois CPA Society

## AWARDS

Houlihan Lokey Corporate Restructuring Case Competition Team Leader

*3<sup>rd</sup> Place out of 11 of the nation's top MBA programs*

## ACTIVITIES

President, Graduate Finance Association • University of Illinois Urbana Champaign: 2009–2010

Teaching English to Speakers of Other Languages (TESOL) English Teacher, JinZhong University, China: 2010

Peer Tutor, North Central College: 2005–2006

## TECHNICAL ACUMEN

Microsoft Office Suite (Excel and Outlook) | QuickBooks | Oracle PeopleSoft | Lacerte

Macola | Peachtree/Sage | QuickBooks Online | SQL | Python | VBA