

Brian O'Connor, CPA

Phone | email | Address | LinkedIn

Tools for Transition Sample Resume Certified Public Accountant

Confidential Accountancy Corporation • Miami, FL
2003 - Present
Specializing in tax compliance

~ Personally responsible for 125 individual income tax returns, 30 business tax returns, 25 trust tax returns ~

TAX

Preparation of individual, trust, estate, small business, C Corporate, S Corporate, LLC, partnerships, family offices, high net worth individuals, payroll tax, sales tax

Assistance with tax authority notices	Foreign bank account reporting	Tax planning
Entity formation	Multistate tax returns	Tax research
Federal / state tax audits	Review of tax work for another CPA	Amended tax returns

FINANCE

Account / bank reconciliations	Consolidations	Chart of Accounts
Adjusting journal entries	FP&A	Internal controls / GAAP
Bookkeeping	Financial Statements	QuickBooks assistance

OFFICE MANAGEMENT

AP / AR / Payroll	Cost controls	Client scheduling
Project management	Banking relationships	Training
Policies / procedures	Software systems implementation	Process Improvements

ESTATES

Planning
Trust administration

CLIENT RELATIONS

Engagement oversight
Business consulting

PROFILE

Education *Confidential* State University, B.S., Business Administration (Accounting)

Certification Certified, State of *Confidential*

Professional Association *Confidential* Society of Certified Public Accountants

~ Continued Page 2 ~

Tools for Transition Sample Resume
Confidential Accountancy Corporation (continued)

SELECTED ACCOMPLISHMENTS

- ✓ Increased revenue by researching market rate for similar services with other firms, and raised professional fees.
- ✓ Reduced operations costs by absorbing work of another employee.
- ✓ Implemented new process of collecting payment for tax returns. Switched to system where payment was collected before the client filed their return. Reduced outstanding AR by 85%.
- ✓ Identified opportunity to improve efficiencies and reduce costs by converting to a new software. Researched, implemented and managed the transition with no client impact.
- ✓ Became point of contact for all clients which improved communication for a variety of matters. This shortened turnaround time for all draft and final documents, quicker billing and easier collections.
- ✓ Hired as Administrative Assistant, promoted to Staff Accountant, then CPA.