Jasper Woods

Certified Public Accountant

(217) 555-1234 jasper.woods@example.com linkedin.com/in/jasperwoods Springfield, IL 62704

SUMMARY

Detail-oriented Certified Public Accountant with over two years in public accounting, specializing in tax preparation and financial advisory services. Established a reputation for meticulous preparation of individual and business tax returns while assisting clients in formulating robust tax planning strategies that foster proactive wealth management. Excellent communication skills foster positive client relations, enhancing the overall service experience. Strong analytical capabilities ensure comprehensive grasp of complex tax laws to address client needs effectively. Committed to advancing personal expertise through continuous learning and developing innovative approaches within the field.

EXPERIENCE

Tax Consultant

ProTax Advisors | June 2024 - Present | Chicago, IL

In this role, provided expert tax consulting services for individuals and small businesses across Chicago, addressing diverse client requirements with trusted financial advice. Effectively collaborated with senior accountants on individual and corporate tax filings, ensuring compliance and achieving optimized financial outcomes.

- Prepared federal and state tax returns for over 100 individual and business clients, promoting strict adherence to tax regulations while capturing frequent feedback.
- Worked closely with senior accountants to flesh out tax planning strategies that resulted in notable savings for clients through engaged presentations during client consultations.
- Conducted thorough research on changing tax laws to provide actionable insights and tailors solutions that critically benefit clients' circumstances.
- Maintained precise and organized client records to facilitate seamless accessibility during heightened activity periods, notably minimizing filing errors.
- Facilitated productive client meetings, delivering clear explanations of financial matters which led to improved ongoing client engagement levels.
- Provided bookkeeping assistance for various accounts, streamlining overall efficiency by integrating straightforward processes into the workflows.

Junior Tax Associate

Bright Future Accounting | January 2023 - May 2024 | Peoria, IL

Starting as a Junior Tax Associate cultivated foundational experience in processing both individual and business tax returns, participating directly in enhancing taxpayer experiences through informed interactions.

- Assisted in preparing individual and business tax returns, acquiring hands-on experience while receiving guidance to refine professional skill sets.
- Engaged across multiple client communications, proactively clarifying tax-related inquiries and unearthing new tax planning opportunities tailored to unique client needs.
- Collaborated directly with senior team members managing deadlines amidst busy seasons, solidifying core organizational competencies necessary for public accounting.
- Participated actively in workshops focused on tax planning and wealth management, enriching knowledge in critical advisory areas when interacting with clients.
- Contributed to internal documentations for compliance processes that effectively facilitated rapid onboarding of new team members along with procedural clarity.
- Participated in book maintenance tasks boosting accuracy rate substantially in day-to-day processing of financial data.

LEADERSHIP & AWARDS

- Excellence Award for Outstanding Performance in Tax Preparation, March 2025
- Recipient of Leadership Development Award, January 2026

EDUCATION

Bachelor of Science in Accounting

University of Illinois | GPA: 3.7 | 2026 | Champaign, IL

Coursework: *Taxation, Financial Reporting, Auditing, Management Accounting*

CERTIFICATIONS

- Certified Public Accountant (CPA) | 2026

- Enrolled Agent (EA) 2026

TECHNICAL SKILLS

- **Tax Software:** Intuit ProConnect, Drake Tax, Thomson Reuters UltraTax
- **Communication Tools:** Zoom, Microsoft Teams, Slack
- **Spreadsheet Applications:** Microsoft Excel, Google Sheets, Numbers
- **Client Management Systems:** Salesforce, QuickBooks, FreshBooks
- **Document Management Tools:** DocuSign, Adobe Acrobat, Dropbox
- **Accounting Principles:** GAAP, IFRS, Tax Law
- **Risk Management Strategies:** Compliance Frameworks, Process Reviews, Trend Analysis
- **Advisory Practices:** Retirement Plans, Estate Management, Wealth Building
- **Project Management Tools:** Trello, Asana, Monday.com
- **Regulatory Standards:** IRS Guidelines, SEC Regulations, AICPA Standards

SKILLS

- Tax Preparation
- Financial Advisory
- Client Relationship Management
- Analytical Problem Solving
- Tax Law Research
- Bookkeeping
- Estate Planning
- Wealth Management
- Tax Compliance
- Interpersonal Skills
- Retirement Strategies
- Financial Planning
- Deadline Management
- Research Proficiency
- Data Analysis

PROFESSIONAL AFFILIATIONS

- Member of American Institute of CPAs (AICPA) fostering industry networking and advocacy.
- Volunteer with local nonprofit organizations providing pro bono tax services for underserved communities.

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST