

Josephine Simpson

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SUMMARY

Indirect tax analyst with three years supporting multi state **sales and use tax**, property **tax compliance**, and real estate operations. Prepares **state and local returns**, validates transaction and property data, reconciles assessed values and tax bills, researches jurisdiction requirements, and maintains accurate compliance records. Advanced Excel skills support large dataset review, lookup analysis, pivot tables, reconciliations, audit schedules, and correction tracking. Experience includes registrations, **business licenses**, renewals, tax notices, incentive deadlines, estimate requests, appeals, internal controls, and consultant coordination. Works closely with Accounting, Accounts Payable, Real Estate, Operations, and external consultants to meet filing deadlines and resolve discrepancies. Brings a practical, organized approach to compliance support, process improvement, and clear communication across multiple jurisdictions.

EXPERIENCE

Indirect Tax Analyst

June 2025 - Present

Sonoran Retail Properties

Phoenix, AZ

Supports indirect tax compliance for a multi location real estate portfolio, covering filings, **property data**, notices, appeals, registrations, audit schedules, and jurisdiction research. Partners with Accounting, Accounts Payable, Real Estate, Operations, and outside consultants to maintain reliable records and meet recurring obligations.

- Prepared state and local **sales and use tax** returns, reconciling source data before timely submission.
- Validated **assessed values**, **tax bills**, parcel records, and jurisdiction data, coordinating corrections for discrepancies.
- Maintained registration, business license, filing, property tax, and incentive deadline calendars across jurisdictions.
- Assembled audit schedules and source documentation, supporting **internal controls** and organized external reviews.
- Coordinated **property tax** estimates and appeals, tracking documentation, status updates, and consultant communications.
- Researched jurisdiction guidance, documenting findings for notices, filing questions, and process updates.

Tax and Accounting Associate

September 2023 - May 2025

Desert Ridge Accounting Services

Tempe, AZ

Supported multi state **sales and use tax** work, property tax record review, audit preparation, and recurring accounting processes. Used Excel and structured documentation to identify coding issues, reconcile source records, maintain notices, and improve monthly compliance preparation.

- Organized **multi state transaction data** and prepared review workpapers for sales tax compliance.
- Used Excel lookups, pivot tables, filters, and reconciliations to identify coding issues before returns.
- Maintained **tax notices**, filing confirmations, exemption documentation, and correspondence in structured records.
- Gathered **property tax** bills and assessments, comparing prior records to flag unusual changes for review.
- Prepared audit support packages from general ledger and invoice data, tying **schedules** to source records.
- Documented recurring data issues and improved monthly compliance checklists for consistent preparation.

PROJECTS

Property Tax Appeal Administration 📅 2025

Built a structured tracking approach for property tax appeal requests, documentation, consultant communications, status updates, and filing deadlines. Clear records helped keep each request visible and supported timely follow through.

Multi State Tax Data Review 📅 2024

Organized transaction data, Excel workpapers, coding checks, and reconciliation steps for recurring sales and use tax preparation. The process made discrepancies easier to spot before review and filing.

LEADERSHIP & AWARDS

- Recognized by tax team leaders for dependable filing records and timely compliance follow through.
- Commended for organized audit schedules, clear issue escalation, and accurate property data review.
- Trusted by colleagues to maintain recurring calendars and resolve documentation gaps before deadlines.

EDUCATION

Bachelor's Degree in Accounting

2023

Arizona State University GPA: 0

Tempe, AZ

Coursework: Financial Accounting, Taxation, Auditing, Business Law

CERTIFICATIONS

- Microsoft Excel Associate 📅 2024
- Bachelor of Science in Accounting 📅 2023

TECHNICAL SKILLS

- **Tax Compliance:** Sales and use tax returns, property tax filings, multi state compliance
- **Tax Research:** Jurisdiction research, tax notices, assessment methodologies
- **Property Tax Systems:** Assessed values, tax bills, parcel records
- **Excel Analysis:** Lookup formulas, pivot tables, filters
- **Data Reconciliation:** Transaction validation, source records, discrepancy review
- **ERP Tax Data:** ERP systems, general ledger data, invoice data
- **Tax Software:** OneSource, tax workpapers, filing records
- **Audit Support:** Audit schedules, source documentation, auditor responses
- **Compliance Records:** Registrations, business licenses, filing confirmations
- **Appeals Administration:** Property tax appeals, estimate requests, incentive deadlines
- **Internal Controls:** Control documentation, review procedures, issue escalation

SKILLS

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|---------------------|----------------|---------------------|---------------------|
| • Indirect Tax | • Tax Appeals | • Microsoft Excel | • Data Validation |
| • Sales and Use Tax | • Tax Research | • Audit Support | • Internal Controls |
| • Property Tax | • OneSource | • Business Licenses | • Reconciliations |
| • Tax Compliance | • ERP Systems | • Registrations | |

PROFESSIONAL AFFILIATIONS

- Accounting and tax operations collaboration across finance, real estate, and property teams.
- Professional development focused on indirect tax research, Excel analysis, and compliance administration.

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST