



# Josephine Simpson

## Indirect Tax Analyst I

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## STRENGTHS

- 📅 **Compliance ownership**  
Kept filing calendars, registrations, notices, and appeal records current, giving teammates a dependable view of obligations.
- 🔍 **Data investigation**  
When assessed values or tax bills looked unusual, traced source records and coordinated corrections before escalation.
- 📊 **Excel analysis**  
Used lookups, pivot tables, filters, and reconciliations to turn large transaction files into reviewable workpapers.
- 📁 **Audit support**  
Built schedules from invoices and ledger records, helping reviewers follow evidence without searching through scattered files.
- 👥 **Cross team coordination**  
Connected Accounting, Accounts Payable, Real Estate, Operations, and consultants so open tax items kept moving.

## SKILLS

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

## 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

Sonoran Retail Properties 📅 June 2025 - Present 📍 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

Desert Ridge Accounting Services 📅 September 2023 - May 2025 📍 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.

LANGUAGES



MY CAREER



- Indirect Tax Analyst at Sonoran Retail Properties (1.2 Years)
- Tax and Accounting Associate at Desert Ridge Accounting Services (1.7 Years)

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**  
Arizona State University 🎓 GPA: 0 📅 2023 📍 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

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.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST