

Emily Hamilton

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SUMMARY

Senior tax and accounting professional with five years of **progressively responsible experience** supporting federal, state, and local reporting, financial analysis, international tax compliance, and controlled transaction processing. CPA with a Bachelor of Business Administration in Accounting and hands on experience preparing Forms 1042-S, 1099-MISC/NEC, W-2G, 990-T, 1099-K, and **Michigan sales tax** filings. Uses **Thomson Reuters Tax Navigator** and International Tax Navigator for treaty analysis, substantial presence testing, income sourcing, and withholding classifications. Reviews financial activity against **Governmental Accounting Standards**, improves reporting workflows, researches changing guidance, and translates findings into clear policies and procedures. Partners with payroll, procurement, accounts payable, and program teams, providing practical training and resolving documentation issues before filing deadlines. Brings thoughtful judgment and steady ownership to complex higher education tax operations.

EXPERIENCE

Senior Tax Analyst, International and Nonresident Tax

July 2024 - Present

Great Lakes Research Foundation

Ann Arbor, Michigan

Owns federal, state, and local reporting for a research focused nonprofit, guiding international tax analysis, workflow controls, policy updates, and stakeholder training.

- Coordinated Forms 1042-S, 1099-MISC/NEC, W-2G, 990-T, and 1099-K filing workstreams.
- Applied **Thomson Reuters Tax Navigator** for treaty eligibility and substantial presence analysis.
- Resolved payment classification gaps with payroll, procurement, accounts payable, and program administrators.
- Redesigned 1042-S readiness reviews around documentation, deposits, coding, and exception tracking.
- Translated new international tax guidance into practical policy updates for management review.
- Led stakeholder workshops on nonresident payments, withholding decisions, and unusual transaction escalation.

Tax Analyst, Nonresident Reporting

June 2022 - June 2024

Midwest Education Finance Collaborative

Lansing, Michigan

Supported education finance programs through information returns, Michigan sales tax analysis, nonresident reporting, financial document review, and stakeholder guidance.

- Prepared reconciliations for federal information returns and **Michigan sales tax** filings.
- Analyzed departmental transactions for taxable activity and information reporting requirements.
- Performed treaty analysis and **substantial presence tests** in **International Tax Navigator**.
- Aligned **withholding classifications** and documentation with payroll and accounts payable teams.
- Reviewed financial documents against procedures and **Governmental Accounting Standards** before approval.
- Created reference guides and trained finance staff on recurring **nonresident tax** workflows.

Staff Accountant, Tax and Assurance

September 2021 - May 2022

Riverbend Public Accounting

Kalamazoo, Michigan

Supported nonprofit and public sector engagements through reconciliations, assurance testing, regulatory research, control documentation, and filing support.

- Prepared reconciliations, account analyses, and workpapers supporting nonprofit regulatory filings.
- Tested transaction samples for **accounting** treatment, internal controls, and procedural consistency.
- Researched federal and state tax questions for senior reviewer consideration.
- Built filing schedules from general ledger data and traced unusual balances.
- Documented control gaps in workpapers that supported corrective action discussions.
- Managed concurrent tax and audit deadlines through organized evidence and status tracking.

PROJECTS

1042-S Reporting Workflow Review 📅 2025

Reworked annual readiness procedures around recipient documentation, payment coding, withholding deposits, exception review, and audit trail quality.

Nonresident Tax Reference Program 📅 2024

Created practical guidance for treaty documentation, substantial presence tests, withholding classifications, reporting calendars, and stakeholder escalation.

LEADERSHIP & AWARDS

- Certified Public Accountant credential earned in Michigan, recognizing advanced tax and accounting competence.
- Progressed from staff accounting and assurance into senior ownership of international tax reporting workflows.
- Selected to lead stakeholder workshops and office hours for recurring nonresident tax questions.

EDUCATION

Bachelor's Degree in Accounting
Western Michigan University GPA: 0
Coursework: Federal taxation, auditing, financial accounting, information technology

2021
Kalamazoo, Michigan

CERTIFICATIONS

- Certified Public Accountant, Michigan 📅 2024
- Michigan CPA License 📅 2024

TECHNICAL SKILLS

- **Tax Forms:** Form 1042-S, Form 1099-MISC/NEC, Form W-2G
- **Nonresident Tax:** International Tax Navigator, Thomson Reuters Tax Navigator, treaty analysis
- **Tax Testing:** Substantial presence tests, income sourcing, withholding classifications
- **Federal Reporting:** Form 990-T, Form 1099-K, IRS reporting
- **State and Local Tax:** Michigan sales tax, state filings, local filings
- **Accounting Standards:** Governmental Accounting Standards, financial accounting, regulatory accounting
- **Financial Systems:** Payment tracking systems, financial system documents, general ledger data
- **Controls and Review:** Internal controls, exception review, reconciliations
- **Policy and Procedures:** Policy development, procedure updates, workflow documentation
- **Stakeholder Enablement:** Staff training, reference guides, office hours

SKILLS

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|----------------------|------------------------|-----------------------|------------------------|
| • Tax reporting | • Tax withholding | • Tax compliance | • Audit workpapers |
| • Treaty analysis | • Policy development | • Presence tests | • Control review |
| • Tax research | • Stakeholder training | • Filing support | • Regulatory reporting |
| • Financial analysis | • Transaction review | • Process improvement | |

PROFESSIONAL AFFILIATIONS

- Michigan accounting community, continuing professional development in tax reporting and financial controls.
- Higher education finance network, sharing practical guidance on nonresident transactions and reporting workflows.

LANGUAGES

- English (Native)
- Spanish (Beginner)

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST