



Joseph Kim

Tax Principal

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STRENGTHS

- Leadership**
Cultivated a high-performing team, recognized for creating an engaging environment that raises performance and morale. 💪
- Strategic Thinking**
Executed tax strategies that align with both market trends and client needs, deepening fulfillment and loyalty. 🧠
- Adaptability**
Navigated shifting regulations adeptly, delivering sustainable solutions that resonate with clients amidst changes. 🔄
- Client Focused**
Invested time in understanding client goals, solidifying trust and turning them into advocates for our services. 😊
- Effective Communication**
Convey complex tax details clearly and succinctly, facilitating informed decision-making among stakeholders. 🗣️

SKILLS

Tax Compliance Tax Advisory

Healthcare Industry Expertise

Client Relationship Management

Team Leadership

Strategic Planning

Microsoft Office Suite

LANGUAGES

English Native

Korean Proficient

SUMMARY

Seasoned tax professional with over 15 years of rich experience in tax advisory and compliance specifically within the healthcare sector. Skilled at managing client relationships, providing expert consulting advice, and leading tax teams to secure positive outcomes for clients. Demonstrated success in complex corporate tax matters, ensuring comprehensive solutions tailored to unique challenges. Committed to enhancing operational efficiency through effective mentoring of junior staff while actively developing business by fostering strategic partnerships. Adept at building loyalty among clients through exceptional service aligned with regulatory standards, ultimately serving as a trusted advisor.

EXPERIENCE

Tax Director

Healthcare Tax Advisors 📅 January 2021 - Present 📍 Houston, TX

Oversee extensive tax advisory services tailored for healthcare industry clients, driving overall excellence in client engagements and strategic planning initiatives across various fiscal responsibilities.

- Established and led a high-performing tax team focused on specialized healthcare services, enhancing both client engagement and satisfaction.
- Implemented strategic tax strategies aligning federal and state regulations, significantly improving resolution timelines for IRS inquiries.
- Collaborated extensively with specialty tax practices, addressing complicated tax scenarios including R&D credits and international taxation issues.
- Hosted targeted training sessions aimed at team competency regarding evolving tax regulations, empowering associates in their professional pursuits.
- Recognized for advisory excellence, resulting in expanded service referrals that bolstered firm growth.

Senior Tax Consultant

Health Tax Strategies 📅 June 2016 - December 2020 📍 Chicago, IL

Served diverse healthcare clients delivering tailored advisory and compliance support while championing impactful business initiatives aimed at long-term retention and operational efficiency.

- Managed clientele with precision, rendering personalized tax compliance solutions that met specific operational needs while cultivating robust client relationships.
- Engaged in broad research on healthcare transactions, delivering actionable insights to enhance client operations and ensure compliance with regulatory changes.
- Led informative workshops, equipping clients with essential knowledge on tax obligations and strategic planning tactics, contributing to increased financial acuity.
- Actively participated in new business development efforts that contributed to a noteworthy increase in new client acquisition, fortified organizational positioning.
- Mentored associates to foster skill enhancement and collaborative work environments, nurturing talent toward advancing the firm's objectives.

Tax Manager

Tax Solutions Group 📅 March 2013 - May 2016 📍 Los Angeles, CA

Directed successful tax compliance frameworks catering to a variety of healthcare clients, ensuring strategic alignment with pertinent regulations and quality benchmarks.

- Oversaw a series of intricate tax research undertakings poised to enhance client positioning and encourage optimal tax strategies.
- Built productive relationships with clients, achieving heightened levels of loyalty, satisfaction, and increased referrals.

MY CAREER



- Tax Director at Healthcare Tax Advisors (5.6 Years)
- Senior Tax Consultant at Health Tax Strategies (4.5 Years)
- Tax Manager at Tax Solutions Group (3.2 Years)

- Drafted compelling proposals that successfully captured multiple lucrative accounts, directly impacting firm's revenue streams.
- Facilitated regular training initiatives that raised team productivity while effectively managing project deadlines and deliverables.
- Streamlined internal processes benefiting overall tax preparation efficiency, cementing reputation as a go-to resource in challenging cases.

LEADERSHIP & AWARDS

- Recipient of the Excellence in Tax Advisory Award, 2020
- Dean's List, University of Southern California, 2009-2011

EDUCATION

Master's Degree in Taxation

University of Southern California 🎓 GPA: 3.8 📅 2011 📍 Los Angeles, CA

Coursework: *Principles of Taxation, Advanced Corporate Tax, Healthcare Taxation, Federal Income Tax*

CERTIFICATIONS

- Certified Public Accountant (CPA) 📅 2012
- Advanced Specialized Tax Certification 📅 2020

TECHNICAL SKILLS

- **Compliance Software:** Intuit ProConnect, Thomson Reuters UltraTax, CCH Axcess
- **Project Management Tools:** Asana, Trello, JIRA
- **Data Analysis Tools:** Excel, Power BI, Tableau
- **Tax Research Platforms:** Bloomberg BNA, RIA Checkpoint, CCH OmniStar
- **Microsoft Products:** Word, Excel, PowerPoint
- **Collaboration Tools:** Slack, Zoom, Microsoft Teams
- **Regulatory Standards:** FAS 109, FIN 48, ASC 740
- **Communication Skills:** Presentation, Writing, Negotiation
- **Process Improvement Methods:** Lean Six Sigma, Agile Principles, Total Quality Management
- **Networking Strategies:** Business Development, Client Outreach, Strategic Partnerships

PROFESSIONAL AFFILIATIONS

- Member, National Association of Tax Professionals
- Volunteer, Local Tax Assistance Program

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST