Karter Barnes

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SUMMARY

Detail-oriented CPA with over 5 years in public accounting, specializing in complex tax planning and compliance for high-net-worth clients. Proven expertise managing multi-state tax engagements, delivering strategic recommendations that enhance operational efficiencies. Recognized for providing exceptional client service while balancing work-life commitments in a collaborative team environment. Dedicated to improving processes, sharing knowledge with junior associates, and ensuring clients receive timely guidance through regulatory complexities. Eager to contribute to innovative practices within a supportive firm and make a lasting impact on clients' financial success.

EXPERIENCE

Tax Specialist CPA
January 2021 - Present

Elite Tax Advisors — *Remote*

Overseeing tax planning and compliance for high-net-worth individuals, ensuring adherence to intricate regulations across multiple states. This role requires collaborating closely with clients and cross-functional teams in a fully remote setting to provide tailored solutions that promote long-term relationships.

- Lead tax planning and compliance for high-net-worth individuals, ensuring adherence to complex tax regulations across multiple states.
- Serve as the primary point of contact for clients, delivering timely guidance and fostering long-term relationships.
- Conduct comprehensive tax research and draft memorandums to support strategic recommendations, enhancing clients' tax positions.
- Identify and implement process improvements and automation strategies that streamlined tax compliance workflows, increasing efficiency.
- Mentor junior tax associates, sharing best practices and fostering a collaborative team environment.
- Collaborate with cross-functional teams to address client needs and optimize tax strategies, contributing to overall client satisfaction.

Senior Tax Consultant
June 2018 - December 2020

Precision Accounting Group — *Remote*

Managed a diverse portfolio of multi-state tax engagements for corporate clients. Focused on strategy formulation to enhance tax efficiency and ensure compliance within the regulatory landscape while facilitating continuous team development and effective audit coordination.

- Managed a diverse portfolio of multi-state tax engagements for corporate clients, ensuring compliance with federal and state tax laws.
- Developed and executed tax strategies for high-net-worth clients, significantly improving their tax efficiency and compliance posture.
- Conducted training sessions for junior staff on tax regulations and compliance best practices, enhancing team capabilities.
- Analyzed complex tax scenarios and provided actionable insights that informed client decision-making.
- Established strong relationships with clients through proactive communication and dedicated service, leading to increased client retention.
- Collaborated with external auditors to ensure seamless tax audits, resulting in successful audit outcomes and client satisfaction.

LEADERSHIP & AWARDS

- Recognized as Top Performer by Elite Tax Advisors for outstanding dedication in client service delivery.
- Received Excellence in Mentoring Award for guiding junior associates and elevating team performance.

EDUCATION

Bachelor of Science in Accounting
2016

University of Massachusetts Boston GPA: 3.7 — *Boston, MA*

Coursework: *Financial Accounting, Taxation, Auditing, Business Law*

CERTIFICATIONS

- Certified Public Accountant (CPA) 2017
- Tax Compliance Certificate 2020

TECHNICAL SKILLS

- **Tax Preparation Software:** ProConnect, CCH Axcess, Intuit ProLine
- **Compliance Tools:** Thomson Reuters Checkpoint, BNA Income Tax Planner, Sales Tax Solutions
- **Tax Research Platforms:** CCH IntelliConnect, Bloomberg Tax, RIA Checkpoint
- **Cloud Accounting Software:** QuickBooks Online, Xero, FreshBooks
- **Document Management Systems:** DocuSign, ShareFile, Dropbox
- **Collaboration Tools:** Microsoft Teams, Zoom, Slack

- **Data Analytics Tools:** Excel, Tableau, Power BI
- **Customer Relationship Management:** Salesforce, HubSpot, Zoho CRM
- **Project Management Software:** Trello, Asana, Monday.com
- **Presentation Software:** Microsoft PowerPoint, Google Slides, Canva

SKILLS

- Tax Planning
- Compliance
- Multi-State Taxation
- Client Relationship Management
- Tax Research
- Process Improvement
- Team Leadership
- Audit Coordination
- Mentorship
- Strategic Recommendations
- Regulatory Compliance
- Time Management
- Problem Solving
- Cross-Functional Collaboration
- Attention to Detail
- Training

PROFESSIONAL AFFILIATIONS

- Member, American Institute of CPAs (AICPA)
- Active Member, Massachusetts Society of CPAs

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST