



# Dallas Gallegos

## Tax Supervisor

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### SUMMARY

Engaging Certified Public Accountant (CPA) with extensive experience in tax management, especially regarding High Net Worth Individuals and corporate entities. Proven ability to oversee tax operations while ensuring compliance with local, state, and federal regulations. Has successfully developed strategic tax plans to minimize liabilities and foster positive relationships with tax authorities and external auditors. Demonstrated leadership through mentoring junior team members to deliver high-quality work consistently. Driven by a passion for collaboration, providing actionable insights that align business decisions with efficient tax strategies, ultimately achieving organizational goals.

### EXPERIENCE

#### Tax Supervisor

Carter & Associates 📅 January 2021 - Present 📍 Cleveland, OH

Leads tax operations within a dynamic firm focused on servicing HNWI and diverse businesses. Managing tax planning, compliance audits, and cultivating strong ties with external partners. Mentors and nurtures junior staff fostering expertise and performance.

- Oversees preparation reviews of tax returns for HNWI and varied corporates including C-Corps, S-Corps, and Partnerships while verifying accuracy.
- Implements comprehensive tax strategies that significantly lower liabilities, keeping regulatory compliance as a priority.
- Serves as the primary liaison for tax-related inquiries from authorities, managing relations for smoother audit processes.
- Advises stakeholders on tax repercussions stemming from strategic business decisions and potential acquisitions.
- Fosters a culture of continuous learning amongst the team, enhancing skills, leading training initiatives and clinic sessions.
- Maximizes overall business value by closely aligning operational changes with tax implications.

#### Tax Manager

Johnson & Sons Tax Advisors 📅 June 2018 - December 2020 📍 Cleveland, OH

Directed diverse tax operation strategies while ensuring compliance amidst evolving regulations. Worked with a variety of clients, including nonprofits and corporations, delivering tailored guidance.

- Managed complex return preparations in compliance with current tax obligations while adapting to shifts in legislative frameworks.
- Developed personalized tax-planning methodologies effectively minimizing fiscal burden for clientele.
- Coordinated team workshops focusing on updated tax regulations, fully equipping staff to handle emerging challenges.
- Conducted thorough risk assessments to pinpoint and remediating areas of compliance vulnerability across the portfolio.
- Created constructive feedback loop enhancing client communication, resulting in elevated satisfaction levels.
- Embraced an ethos of professional development through ongoing education in tax legislation relevance.

### LEADERSHIP & AWARDS

- Top Employee Recognition for Excellence in Tax Strategy Development, Carter & Associates
- Team Leadership Award, Johnson & Sons Tax Advisors

### EDUCATION

#### Bachelor's Degree in Accounting

1/2

### STRENGTHS



#### Strategic Thinking

Consistently identifies solutions and advice based on analysis and trends, effective tax positioning is achieved.



#### Mentorship

Guided junior team members toward growing their competencies, establishing a collaborative team environment.



#### Compliance Focused

Ensured adherence to ever-changing tax laws while maintaining integrity in operations and reporting standards.



#### Client Relations

Built trusted relationships with clients by addressing needs and aligning tax strategies realizable outcomes.



#### Analytical Skills

Evaluated tax data and applied insights to help businesses navigate complexities effectively with clarity.

### SKILLS

Tax Compliance   Audit Defense

Regulatory Knowledge

Financial Analysis

Strategic Tax Planning

Client Relationship Management

Leadership   Risk Assessment

Training Development

Team Collaboration

Communication Skills

Operational Strategy

Problem-Solving

Business Partnership   Adaptability

## LANGUAGES

English Native

Spanish Intermediate

## MY CAREER



● Tax Supervisor at Carter & Associates (5.5 Years)

● Tax Manager at Johnson & Sons Tax Advisors (2.5 Years)

University of Akron 🎓 GPA: 3.8 📅 2016 📍 Akron, OH

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

## CERTIFICATIONS

- Certified Public Accountant (CPA) 📅 2017
- Advanced Certificate in Taxation 📅 2019

## TECHNICAL SKILLS

- **Accounting Software:** QuickBooks, TurboTax, Xero
- **Data Analysis Tools:** Excel, Tableau, SAS
- **Tax Preparation Software:** CCH Axcess, Drake Tax, Thomson Reuters Advance
- **Regulatory Compliance Tools:** Salesforce, SAP, Workday
- **Collaboration Platforms:** Asana, Slack, Microsoft Teams
- **Financial Modelling:** SQL, MATLAB, R
- **Presentation Software:** PowerPoint, Prezi, Google Slides
- **Document Management Systems:** Yardi, DocuSign, Box
- **Project Management Tools:** Trello, JIRA, Monday.com
- **Tax Research Databases:** BNA, CCH News, IRS Website

## PROFESSIONAL AFFILIATIONS

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

## ADDITIONAL INFORMATION

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

## REFERENCES

AVAILABLE ON REQUEST