



Dallas Gallegos

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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

January 2021 - Present

Carter & Associates

Cleveland, OH

Leads tax operations within a dynamic firm focused on servicing HNWIs 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

June 2018 - December 2020

Johnson & Sons Tax Advisors

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

2016

University of Akron GPA: 3.8

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

SKILLS

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|------------------------|----------------------------------|------------------------|------------------------|
| • Tax Compliance | • Strategic Tax Planning | • Training Development | • Problem-Solving |
| • Audit Defense | • Client Relationship Management | • Team Collaboration | • Business Partnership |
| • Regulatory Knowledge | • Leadership | • Communication Skills | • Adaptability |
| • Financial Analysis | • Risk Assessment | • Operational Strategy | |

PROFESSIONAL AFFILIATIONS

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

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST