

Tax Preparer and Bookkeeper at Liberty Tax Service

Summary

As a professional bookkeeper and tax preparer, I embrace challenging opportunities for growth.

Registered tax preparer with the California Tax Education Council. I am a member of the California Society of Enrolled Agents and I have a small tax and bookkeeping practice in Newark, CA.

Practicing for 14 years.

Serve individuals, businesses and non-profit organizations in all areas of tax compliance and bookkeeping. Specialize in Franchises. My goal is to help small businesses increase their efficiency and effectiveness by assisting them in managing their bookkeeping and tax information.

My mission is to provide complete, secure and accurate service while insuring a peace of mind for each of our clients.

Specialties: bookkeeping, taxes, tax laws, small business taxes, small business bookkeeping, QuickBooks, QuickBooks Pro, Auicken, customer services, organization, tax preparation, federal tax preparation, state tax preparation, tax filing, office management, resourceful, problem solver, analytical, payroll, payroll preparation, accounts receivable, accounts payable, expenses, marketing, marketing materials, IRS, Internal Revenue Service, Lacerte Tax Software, California tax laws, business ownership

Experience

Top Skills

Tax Preparation

QuickBooks

Tax

Affordable Tax Services & Bookkeeping
Tax Preparer and Bookkeeper
October 2001 - Present (22 years 11 months)
Newark, CA

- Establishing and maintaining one-on-one client communications to prepare and file individual and business income taxes.
- Acting supervisor for team members and temporary staffers during peak season.
- Efficiently organizing overall office functions, such as creating forms, processes and procedures; tracking client status and daily work flow; transmitting e-files; receiving acknowledgments; and generating database reports.
- Prepare detailed tax forms, including: 1120, 100s, 1065, 1040, 2106, 8453, 8879, Schedule C, D and E.
- Effectively managing Accounts Payable and Receivable for entire company, including apply payments to invoices, computing weekly bank deposits, reconcile bank accounts, recording general ledger entries, generating monthly and yearly reports.
- Consistently preparing bi-weekly payroll and Federal, FICA, and state withholding deposits. Prepared and filed 941, DE88, and DE6 quarterly payroll, federal and state tax returns.

Liberty Tax Service
Tax Preparer and Bookkeeper
February 2001 - Present (23 years 7 months)
Newark, CA

Liberty Tax Service is a full service organization serving small businesses in all areas of tax compliance and bookkeeping. Our primary goal is to help your business increase productivity, reduce costs and improve business quality. We specialize in small businesses from 1 to 50 employees.

The Newark Chamber of Commerce
Tax Preparer & Bookkeeper
2007 - 2008 (1 year)
37101 Newark Blvd, Newark, CA 94560

Education

California Society of Enrolled Agents' Super Seminar:

Accounting · (2008 - 2008)

Ongoing Professional Education

Accounting, Bookkeeping, Small Business · (2002 - 2008)