

Michael C. Tax

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CORPORATE ACCOUNTING, FINANCE & TAX

More than 15 years' professional experience in the planning, administration and control of corporate accounting, finance and tax operations. Excellent analytical, negotiation, project management and customer relationship management skills. PC proficiency with Microsoft Office and specialized accounting and financial analysis/reporting software. Common-sense intelligence with expertise in:

- Financial Planning, Research, Analysis & Reporting
- Federal & State Corporate Taxation
- General Accounting & Month-End Reporting
- Investment Finance & Portfolio Analysis
- Accounts Payable, Accounts Receivable & Reconciliations
- Regulatory Compliance & Reporting
- Earnings Analysis & Forecasting
- Financial Modeling & Income/Expense Projections

PROFESSIONAL EXPERIENCE

GRAY, DAVISON & COMPANY

Philadelphia, PA
2001 to Present

Managing Director, Research & Financial Analyst
Portfolio Accountant / Trader
Institutional Research & Sales Analyst

Joined Branch Cabell in 2001 as part of a 12-person financial investment team. Recruited to Jordan Aberson by former manager to spearhead the start-up of their internal investment, financial research and portfolio accounting functions. Again recruited and merged company in 2005 to Gray, Davison & Company by another former manager to orchestrate the start-up and subsequent management of their in-house research operation.

- Acquired excellent experience on both the buy and sell sides of the retail and institutional financial investment industries. Particular knowledge of mutual fund and hedge fund products/portfolios.
- Built and maintained strong working relationships with top executives of small- and mid-cap companies nationwide to evaluate their financial positions, discuss earnings forecasts and perform comprehensive research reports as per NASD regulations.
- Provided the critical research, analytical and documentation support essential for the growth and expansion of each firm. Gray, Davison grew from launch to profit within first year; Jordan Aberson experienced 45% growth in a poor investment market.

KRUGMAN CORPORATION

Philadelphia, PA
1999 to 2001

Tax Analyst

Joined Krugman Corporation, a Fortune 500 consumer paper and plastics goods manufacturer with 100+ operating locations and more than 20,000 employees worldwide.

- Spearheaded a series of special projects to identify and capture opportunities to reduce corporate tax obligations throughout the company's domestic operations.
- Evaluated tax implications of proposed mergers and acquisitions, capital equipment expenditures, payroll processing, inventory management and other functions/actions with significant tax ramifications.
- Consulted with business unit directors to provide tax expertise relative to plant operations, location selection, asset acquisition and divestiture and other general operating issues.

DEAN WITTER, INC.

Account Executive

Philadelphia, PA

1998

Leveraged accounting and financial experience to enter the investment market and expand professional skills to include sales, marketing and new business development. Concentrated on acquisition of new customer accounts and sale of a diverse portfolio of security and mutual fund products. Provided clients with portfolio analysis and asset allocation strategies to limit risk exposure and maximize returns.

NORTHERN SECURITY GROUP

Corporate Tax Manager

Philadelphia, PA

1997 to 1998

Managed corporate tax affairs for three Northern Security Group insurance companies. Coordinated preparation of quarterly and annual tax returns for both state and federal governments, as well as managing comprehensive tax research/analysis function. Liaised with government officials as necessary.

- Delivered comprehensive financial and tax analyses, reports and recommendations to support corporate restructuring, merger and acquisition projects as the company expanded and diversified.

UNION PACIFIC LIFE INSURANCE COMPANY

Washington, DC

1992 to 1997

Tax Manager (1994)

Tax Supervisor (1992 to 1994)

Financial Accounting Supervisor (1989 to 1992)

Fast-track promotion through a series of increasingly responsible corporate accounting and tax management positions with one of the nation's only union-owned insurance companies.

- Planned, staffed and managed daily tax operations for Union Labor Life and its 19 affiliated life and health insurance companies.
- Managed a complex corporate tax compliance process to ensure full regulatory compliance and personally prepared the federal income tax return.
- Directed a series of special tax research projects to identify areas to eliminate tax liabilities and annual obligations. Contributed to substantial annual cost savings.
- Planned, staffed and supervised general accounting functions and managed financial analysis projects for senior management. Point person for annual external audits.

EDUCATION

MS Accounting, Liberty University, Lynchburg, VA

Anticipated 2012

B.S. Finance, University of Virginia, Charlottesville, VA

1990