

Michael C. Tax

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Senior Accountant

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. Utilization of Peachtree, QuickBooks, Microsoft Office Suite 2010, Strong combination of software knowledge, proven leadership, and key proficiencies:

- Financial Reporting
- Public Accounting
- Grant Billing/Tracking
- Income/Expense Projections
- Payroll Accounting
- Staff Management
- Month-End Reporting
- Variance Analysis
- Annual Tax Preparation
- Account Analysis
- Federal Taxation
- Budget Coordination

Education

Master of Science in Accounting, Liberty University, Lynchburg, VA Anticipated May 2013
Bachelor of Science in Finance, University of Virginia, Charlottesville, VA May 1990

Experience

Gray, Davidson, & Company, Philadelphia, PA 2001 to Present

Managing Director, Research & Financial Analyst *2010-Present*
Portfolio Accountant/Trader *2005-2010*
Institutional Research & Sales Analyst *2001-2005*

- 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 the firm
- Instrumental in significant growth: Gray, Davison grew from launch to profit within first year; later experienced 45% growth in a poor investment market

Krugman Corporation, Philadelphia, PA 1999-2001

Tax Analyst

- 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., Philadelphia, PA

1998

Account Executive

- 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, Philadelphia PA

1997-1998

Corporate Tax Manager

- 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

1992-1997

Tax Manager

1994-1997

Tax Supervisor

1992-1994

Financial Accounting Supervisor

1998-1992

- 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

American Partners Life Insurance Company, Washington, DC

1990 – 1992

Staff Accountant

- Planned and coordinated critical accounting and financial records for one of the largest life insurance companies in the U.S.
- Acquired outstanding experience in virtually all facets of corporate accounting, analysis and financial reporting
- Specialized in preparation of STAT and GAAP financial statements for both the parent corporation and its reinsurance subsidiary