

# Morgan Accounting

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## PROFESSIONAL SUMMARY

More than 15 years' professional experience in the planning, administration and control of corporate accounting, finance and tax operations.

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

## PROFESSIONAL EXPERIENCE

### Harcourt & Company

*Senior Tax Accountant*

Boston, MA  
2013 to Present

Prepared and reviewed insurance premium tax returns for 4 insurance companies with filing requirements in all 50 states.

- Amended companies Massachusetts 2015 tax returns to request a \$2.3MM refund. Return was amended to include loss companies omitted from original unitary returns.
- Prepare and review state income tax returns for insurance companies with filing requirements in 50 states.
- Consolidate and prepare federal Form 1120 including 13 subsidiaries.
- Prepare and review account reconciliations for all tax related accounts, such as State Income Tax, Premium Tax, Excise Tax, real estate tax, Federal Current Income Tax, and Federal Deferred Income Tax.
- Prepare and review the monthly Income Tax Provision.

### Bowman, Durant & Associates

*Tax Analyst*

Somerville, MA  
2010 to 2013

Joined Bowman, Durant & Associates, a Fortune 500 paper manufacturer with over 120 locations and > 15,000 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 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.

### Howes, Trent & Boxley Inc.

*Senior Accountant*

Boston, MA  
2007 to 2010

- Licenses/Permits: Supervised the Tax Administrative Assistance in the filing of 3,500+ licenses and permits in various states, counties and cities.
- Partnership Returns: Filed partnership returns for federal and state tax purposes.
- Account Reconciliation/Analysis: Managed all aspects of the general ledger associated with tax compliance.
- Coordinate State Sales Audits: Managed all sales tax and property tax audits. Negotiated settlements, and also developed a proactive audit methodology.
- Coordinate Mergers/Acquisitions: Managed all new business generated from mergers acquisitions.
- Research/Development: Researched sales and use tax issues along with preparing correspondence on these issues to the field and management.

**ABC Security Associates, Inc.**  
*Corporate Tax Manager*Boston, MA  
2005 to 2007

Managed corporate tax affairs for three ABC Security Associates Inc. insurance companies.

- Delivered comprehensive financial and tax analyses, reports, and recommendations to support corporate restructuring, merger and acquisition projects as the company expanded and diversified.
- Coordinated preparation of quarterly and annual tax returns for both state and federal governments, as well as managing comprehensive tax research and analysis functions.
- Liaised with government officials as necessary.

**Allied Insurance Company**  
*Tax Manager*Washington, DC  
2003 to 2005

Corporate accounting and tax management position with one of the nation's only union-owned insurance companies.

- Planned, staffed, and managed daily tax operations for Allied Labor Life and its 12-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 of > \$1.2MM.
- Planned, staffed and supervised general accounting functions and managed financial analysis projects for senior management. Point person for annual external audits.

**Global Insurance Company**  
*Staff Accountant*Washington, DC  
2002 to 2003

Excellent planning and coordination of critical accounting and financial records for one of the largest life insurance companies in the U.S. Experienced in virtually all facets of corporate accounting, analysis and financial reporting. Specialized in required SAP quarterly filings, annual reports, and financial statements for Securities and Exchange Commission, for both the parent corporation and its reinsurance subsidiary.

**EDUCATION****Liberty University**  
*Master of Science in Accounting*Lynchburg, VA  
Anticipated 2018**University of Fulsom**  
*Bachelor of Science in Accounting*Janisville, WA  
June 2002