

JOHN SMITH, CPA

Phone • Email Address

TAXATION MANAGER

A proven tax expert offers extensive experience in leadership/advisory roles, working to improve policies, processes, and quality controls while driving compliance to state/federal laws. Consistently achieves domestic and international multi-party transaction goals by negotiating critical deals. Serves as a trusted advisor to executive leadership, boards, management, and clients to develop strategies for growth, risk management, and financial wellness. *Expertise includes:*

- **R&D Tax Credits • Consulting • Risk Management • State/Local Tax Laws • SEC Regulations • Compliance • Financial Auditing • Federal Tax Provision • Corporate Taxes • Negotiations • Deal Structuring • Project Management • Strategic Planning • Restructuring • Property Tax Laws • Business Development**

Provides Calm Leadership for Both Routine and Crisis Tax Situations in Public and Private Settings....

Foreign Trade Expert:

Managed transfer pricing issues for 25 countries and jurisdictions by guiding clients through OECD's transfer

pricing documentation, reporting, and Action 13 matters.

IPO Tax Specialist:

Designed a tax-free roll-up of more than 30,000 partners into new IPO listed on NYSE.

Cost Savings Specialist:

Saved hundreds of millions of dollars by performing complete and accurate business valuation due diligence on several companies up for sale.

Client Advocate:

Slashed tax liability of each client by at least 25% via comprehensive structuring of transactions in a way that aligned with stated business goals and objectives.

PROFESSIONAL OVERVIEW

Senior Tax Manager

– Company Name (2010 – 2017)

Managed 10 tax professionals while working with global clients to thoroughly address their tax-related questions.

Provided clients with opinions and determined the correct strategy and path that met or exceeded financial goals.

- Served as a consultant/SME for advanced oil and gas tax positions/questions; created comprehensive projections for proposed oil and gas transactions, maintaining high accuracy for estimating future tax liability.
- Monitored, researched, and implemented actions that resolved international inbound/outbound transactions; expedited transaction turnaround and greatly reduced risk/liability to the client(s).
- Brought into firm multiple new global companies with fees exceeding several million dollars each.
- Represented client before the IRS, saving millions of dollars in taxes, fees, and penalties.
- Lifted quality and cut costs by instituting new process for executing partnership tax returns, tax research, and international consolidated returns; facilitated and participated in annual partnership taxation training.

Taxation Department Manager

– Company Name (2005 – 2010)

Managed 15 department members in overseeing international taxation and financial transactions while leading business valuation projects across all lines of business and periodically audited financial records and processes.

- Reduced overall number of findings 10% per year through advanced preparation as part of periodically audited financial statements and reconciled records of bank transactions.
- Ensured 100% compliance to all regulatory requirements, including specific ERISA reporting; mitigated risk to the clients and virtually eliminated recurring problems.
- Saved millions of dollars by filing and receiving favorable rulings from federal regulators.
- Proved vital to growing assets under management to \$500M+.
- Prevented millions of dollars in corporate fines by resolving a major IRS audit of a consolidated tax return.

EDUCATION & CREDENTIALS

BBA, Accounting

(Sigma cum Laude) – State [University](#) / **Certified Public Accountant**

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