



Amelia Johnson

Tax Preparation Assistant

Dedicated tax preparation assistant with 8 years of experience supporting high-volume individual and small business tax filings. Proficient in IRS compliance, audit assistance, and deduction optimization for diverse client portfolios. Known for maintaining exceptional accuracy across 300+ annual returns, providing personalized client guidance, and managing audit documentation with precision. Committed to ensuring every client filing is accurate, compliant, and optimized for their financial situation.



Portland, OR



(123) 456-7890



email@example.com

KEY SKILLS

- Individual and small business tax return preparation
- IRS compliance and regulatory research
- Tax deduction and credit optimization
- Audit assistance and documentation management
- Client communication and advisory support
- Multi-year tax record organization
- ProSeries, TurboTax Business, and Drake Tax
- Financial record review and compliance verification
- Year-end planning and quarterly estimated tax support

CERTIFICATIONS

- Enrolled Agent (EA), IRS, September 2017
- IRS VITA Certification, IRS, December 2016
- Annual Filing Season Program (AFSP), IRS, 2022, 2023

PROFESSIONAL EXPERIENCE

TAX PREPARATION ASSISTANT

HORIZON TAX SERVICES, PORTLAND, OR | APRIL 2017 – PRESENT

- Supported preparation of 300+ individual tax returns annually, achieving a 97% accuracy rate and reducing amendment filings by 35% through a pre-submission review process
- Reviewed small business financial records for 40+ clients, identifying tax deductions and credits that reduced average client tax liability by 12%
- Assisted clients during 20 IRS audits over tenure, preparing comprehensive documentation packages that achieved 100% on-time submission with zero penalty assessments
- Maintained IRS compliance tracking for 300+ client accounts, ensuring zero late filings across 7 consecutive tax seasons
- Researched 15+ IRS regulatory updates annually, briefing the team on applicable changes that affected client filing strategies
- Trained 2 junior tax assistants on preparation procedures and documentation standards, reducing their first-season error rates by 25%

ACCOUNTING CLERK

PACIFIC FINANCIAL SOLUTIONS, PORTLAND, OR | MAY 2015 – MARCH 2017

- Processed financial records for 150+ individual tax filings per season, maintaining strict confidentiality standards and zero data security incidents over 2 years
- Organized client tax documentation for 150+ files, creating standardized folder structures that reduced senior preparer setup time by 3 hours per client
- Researched IRS regulations for 20+ complex client situations, providing annotated summaries used by senior preparers to ensure accurate filings
- Supported annual staff training on updated IRS guidelines, preparing reference materials used by the 6-person preparation team

EDUCATION

Bachelor of Science in Accounting

University of Oregon, Eugene, OR | December 2014