



MARCUS WHITFIELD

Tax Preparer

Seasonal tax preparer completing a second full season on individual returns, with a PTIN in good standing and AFSP Record of Completion for the current filing year. Comfortable with W-2 wage income, common self-employment forms, and standard credit situations, and building toward the Enrolled Agent exam.

CONTACT INFORMATION



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Boise, ID 12345

KEY SKILLS

- Form 1040 and common schedules
- Earned income, child tax, and education credits
- Drake Tax
- TaxSlayer Pro (volunteer site edition)
- Client interviewing and intake
- E-file transmission and rejection troubleshooting
- Excel (VLOOKUP, pivot tables)

Professional Experience

TAX PREPARER I SAGEBRUSH TAX CO., BOISE, ID JAN 2024 - PRESENT

- Prepared 180+ individual returns in first full season, primarily 1040 with earned income, Child Tax Credit, and education credit situations.
- Ran client intake interviews using the office checklist and flagged missing 1095-A forms before starting returns, which cut rework on marketplace insurance clients.
- Completed 18 hours of continuing education and earned the AFSP Record of Completion for the 2024 filing season.
- Handled walk-in questions on refund status and IRS 'Where's My Refund' tool for 6 to 10 clients per day during peak weeks.

TAX PREPARER INTERN I CASCADE VOLUNTEER INCOME TAX ASSISTANCE SITE, MERIDIAN, ID JAN 2023 - APR 2023

- Prepared and e-filed 62 returns for low-income filers under IRS-certified Advanced volunteer status.
- Passed the IRS volunteer preparer advanced certification on first attempt and served as site quality reviewer for the last three weeks of the season.
- Explained refund and balance-due outcomes to clients in plain language, often walking through withholding adjustments for the following year.

Education

- B.B.A. Accounting, Boise State University, 2023
- IRS AFSP Record of Completion, 2024 filing season
- PTIN active