



# PRIYA RAMANATHAN

## Tax Preparer

Senior tax preparer with 7 seasons of individual and small-business returns across NC, VA, and SC filers. Enrolled Agent focused on Schedule C, rental, and multi-state returns, with a clean IRS correspondence record over the last four seasons.

### CONTACT INFORMATION



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### EDUCATION

- **ENROLLED AGENT, IRS, ACTIVE SINCE 2020**
- **B.S. ACCOUNTING, NORTH CAROLINA STATE UNIVERSITY, 2018**

### KEY SKILLS

- **Form 1040, Schedules A/B/C/D/E**
- **Multi-state individual returns**
- **IRS notice response (CP2000, CP14)**
- **Drake Tax, ProSeries, UltraTax**
- **QuickBooks Online for Schedule C reconciliation**
- **Installment agreements and penalty abatement requests**
- **Client intake and document review**
- **Spanish (conversational)**

### PROFESSIONAL EXPERIENCE

#### SENIOR TAX PREPARER I BLUELINE TAX & ADVISORY, RALEIGH, NC | 2021 - PRESENT

- Prepare 480+ returns per season, mix of 1040 with Schedule C, E, and multi-state allocations for remote workers relocating from VA and DC.
- Second-review lead for three seasonal preparers, catching an average of 12 to 15 material errors per week during peak weeks in March.
- Cleaned up a client's three-year backlog of unfiled returns, coordinated an installment agreement, and reduced proposed penalties by roughly \$8,400.
- Introduced a pre-appointment intake checklist that cut average prep time per return by about 20 minutes and reduced client callbacks for missing documents.
- Handle CP2000 and state notice responses end-to-end, including drafting the response letter and following through to case closure.

#### TAX PREPARER I CAROLINA FAMILY TAX SERVICES, CARY, NC | 2018 - 2021

- Prepared 260 to 310 individual returns per season, primarily W-2 filers with itemized deductions, health savings account activity, and dependent care credits.
- Trained on ProSeries and Drake in first season; became the office go-to for married filing separately versus joint scenarios and student loan interest edge cases.
- Reviewed prior-year returns for new clients and identified amendments worth roughly \$22,000 in aggregate refunds over two seasons.
- Covered front-desk intake during peak weekends, screening documents so preparers rarely started a return with missing forms.