



CONTACT INFORMATION

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 Providence, RI 02903

EDUCATION

- M.S. Taxation, Bryant University, 2013
- B.S. Accounting, University of Rhode Island, 2011
- CPA, Rhode Island (active, license in good standing)

KEY SKILLS

- Team leadership and review management
- 1040, 1065, 1120-S, 1041 review
- Multi-state and residency analysis
- Foreign reporting (Form 8938, FinCEN 114)
- Firm tax preparation and engagement platforms, GoFileRoom
- IRS and state examination representation
- Firm workflow and quality control design
- Client relationship management
- Practice growth and pricing
- Staff training and CPA/EA mentoring

ALEJANDRO DUARTE

Tax Manager

ABOUT ME

Tax Manager and licensed CPA with 14 years in public accounting, leading individual and small-business tax practices at regional firms. Runs seasonal teams of 6 to 10 preparers and reviewers, owns the technical review queue, and manages a book of complex 1040, 1065, and 1120-S clients across New England.

PROFESSIONAL EXPERIENCE

Tax Manager | Narragansett Tax Partners, Providence, RI
2020 – Present

- Manage a seasonal team of 9 (2 seniors, 5 preparers, 2 admin) responsible for roughly 2,600 returns per season across 1040, 1065, and 1120-S.
- Own final review on all pass-through returns above \$2M in revenue and all 1040s with foreign account reporting requirements.
- Rebuilt the review workflow in the firm's tax software, cutting average time in review status from 6.2 days to 3.8 days over one season.
- Grew the firm's tax revenue from about \$1.9M to \$3.1M over four years through client referrals and a rental-portfolio niche.
- Represent clients in IRS and RI Division of Taxation examinations, closing a 2023 residency audit with no additional tax assessed.

Senior Tax Manager (Acting) | Bay State Advisory CPAs, Fall River, MA
2017 – 2020

- Led the individual tax group of 6 preparers through the 2017 federal tax law transition, including client communications, worksheet redesign, and staff training.
- Reviewed 400+ high-net-worth 1040s per season, including trust K-1s, alternative investment K-1s, and multi-state allocations.
- Built the firm's first written tax quality control policy after a peer review recommendation, adopted by the partners in 2019.
- Mentored two staff through the CPA exam and one through the Enrolled Agent exam.
- Managed the firm's response to a state sales tax nexus notice affecting 14 e-commerce clients following the Wayfair decision.

Tax Senior | Ostrowski & Hale CPAs, Warwick, RI
2014 – 2017

- Prepared and reviewed 1040, 1065, 1120-S, and 1041 returns for a portfolio of family businesses and their owners.
- Ran the intern training program for two busy seasons, including two hours of weekly technical sessions.
- Drafted the firm's client-facing summaries for 2017 federal tax law changes affecting pass-through owners.
- Handled quarterly estimated tax planning for approximately 45 business-owner clients.

Tax Staff | Ostrowski & Hale CPAs, Warwick, RI
2011 – 2014

- Prepared 220 to 280 individual returns per season with progressive complexity, including Schedule C, E, and F clients.
- Passed all four sections of the CPA exam within 11 months of hire.
- Assisted on 1041 fiduciary returns and learned trust accounting income vs distributable net income calculations.
- Reconciled QuickBooks files for 30+ Schedule C clients each January before tax prep began.