

Brock Palmatier

Scotia, NY 12302 – (518) 669-6616 – bap12489@gmail.com

PROFESSIONAL GOAL

To secure a position that will allow me to utilize my transferrable skills and education, relating to taxation, international tax, tax planning, tax projecting and tax consulting, to be an efficient and productive employee.

SKILLS

- Tax preparation, review, representation, consultation
- ASC 740, GAAP
- Drake, Lacerte, ProSeries, CCH, TaxDome, MicroSoft Teams, Slack, Zoom
- 500+ returns/year prepared and reviewed
- Information gathering, leadership
- Attention to detail
- Organizational and planning skills
- 1040, 1041, 1120, 1120S, 1120F, 1065, 990, 709
- Problem recognition and resolution

EDUCATION

- BS in Accounting.
Louisiana State University Online
- BS in Finance
Virginia Commonwealth University

Licensing

- Enrolled Agent

WORK HISTORY

Tax Manager, Thomson Accountants and Advisors, Troy, NY, Temp/Contract 7/2022-6/2024

Prepare complex tax returns for individuals, trusts, partnerships and corporations. Research and analyze law changes. Implement procedures for workflow of returns. Review subordinates' returns and advise errors. Evaluate performance of staff. Assign tasks to staff based on levels of experience. International tax, tax treaty research. Review subordinate returns for accuracy and evaluate/advise upon performance. POA for government discussions. Asset management/depreciation. Compliance and Assurance internal controls implementation

AR Manager, Legal Aid Society of Northern NY, Albany, NY, Temp/Contract 12/2021-7/2022

Grant allocation, Applications, Payroll Allocation by project, Grant billback to provider, meetings with Directors and Grant Providers to discuss any variances. Macros, Pivot Tables, V-Look Up in Excel. Find the best resolution to any problems or discrepancies. Performance evaluation. Reporting to executives.

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Staff Accountant, Redburn Development Partners, Schenectady, NY Full Time 3/2020 – 12/2021

Examine, analyze and interpret records to prepare financial statements. Give advice and evaluate statements prepared by others. Work with property managers to develop and implements CAM for multi-use properties. Verify and validate data for journal entries into Yardi. Evaluate AR and AP processes. Variances and ad-hoc reporting. Performance reporting to principles amongst properties.

Financial Analyst, Maximus Inc., Albany, NY Full Time 2/2013 - 3/2020

Reconcile timesheets. Expense Forecasting and audit, AR including receipt posting and reconciliation. AP includes issue off checks and coding to correct accounts. Forecasting, Pivot Tables, Macros creation functions in Excel. General Ledger and financial statement analysis as well as creating and adjusting GL accounts. Direct reporting to project VP.

Sr. Tax Associate, Staff Ciampino and Company, CPAs, Albany, NY Seasonal 12/2012-06/2016

Tax Projections, Tax Planning and strategies. MST Compliance and research, international Treaties, 1120, 1120S, 1120F 1065, 5471, 5472, 8833, 1040, 1041, 990. Review and advise upon returns, tax resolution and negotiation, audit compliance. Analyze financial statements, accrual to cash adjustments

Tax Preparer, H&R Block, Troy, NY Seasonal 11/2009 -05/2011 10/2016-06/2022

1040,1041, 1065, 1120, 1120S, 990 preparations. Analysis of financial information. Tax planning and advisory. Tax research. Review coworker returns for accuracy and advisement.

Owner, BP Accounting, Ravena, NY 01/2005-10/2019

Acknowledge issues when arise and resolve accordingly. Income tax, sales tax, R&D Tax Credit, Bookkeeping, Month end close, Fixed asset management, accruals, loan applications and documentation, year end close, bank rec, GL rec, 941 rec. Tax research. Financial statement analysis. Tax compliance and assurance. International Tax. Forms 5471, 5472, 8621. Foreign Tax Credit. Review returns by subordinates. Manage and evaluate performance. Advise upon weaknesses.