

David White

CPA, MST

Clearwater, FL 33759

davidwhite9978_ht3@indeedemail.com

+1 727 409 4302

Authorized to work in the US for any employer

Work Experience

Tax Accountant

Bank of America - Remote

August 2022 to December 2023

- Prepare returns 1040 for ultra high net worth individuals
- Review returns 1040
- Prepare various ad hoc reports for wealth management team
- Train staff in tax laws and tax preparation procedures
- Research tax laws and complex issues using various tax research tools

Owner

DBW Taxes, Inc - Clearwater, FL

November 2018 to August 2022

- Prepare returns including 1040, 1041, 1065, 1120
- Prepare Expat returns
- Prepare and review operating partnerships and real estate partnerships
- Remote contract work with accounting firms

Tax Manager

Ernst & Young - Chicago, IL

November 2017 to November 2018

- Review individual, partnership trust, and gift tax returns for high net-worth households
- Review and manage team of seniors and associates
- Train staff in tax laws and tax preparation procedures
- Research tax laws and complex issues using various tax research tools

Tax Manager

Ostrow, Reisin, Berk & Abrams - Chicago, IL

July 2015 to November 2017

- Review individual, estate, trust, and gift tax returns for high net-worth households and executives
- Prepare and review operating partnerships and real estate partnerships
- Review returns including 1040, 1041, 1065, 709
- Review returns for US Expats and 1040-NR's for non US residents
- Evaluate staff performance

- Train staff in tax laws and tax preparation procedures
- Interact with clients to answer tax questions, resolve issues and
- Represent clients on IRS audits and notices
- Research tax laws and complex issues using various tax research tools
- Assist clients with succession planning and estate planning

Senior Tax Accountant

PWC - Chicago, IL

February 2014 to July 2015

- Review individual, trust, and gift tax returns for high net-worth households and executives
- Review returns including 1040, 1065, 709, 1041, 1116 & FinCEN
- Member of the Partner Prep Program (PPP)
- Reviewed Partner returns, corresponded with Partners to gather tax info and provide tax advice
- Prepare quarterly estimate projections
- Manage and train associates in tax laws and tax preparation
- Interact with clients to answer tax questions and resolve issues
- Interact with IRS on behalf of clients under POA, to resolve notices
- Researched tax law questions and changes using CCH, RIA and other tax research tools

Tax Accountant

Bank of America - Chicago, IL

February 2009 to February 2014

- Prepare individual, trust, and gift tax returns for high net-worth households
- Prepare returns including 1040, 1120, 1120-S, 1065, 709, 1041, 1116 & FinCEN
- Researched tax law questions and changes using CCH, RIA and other tax research tools
- Designed and implemented training program for seasonal employees
- Return reviewer for junior preparers
- Co-lead of paperless office project using Prosystems paperless features

Education

Master's in Taxation

Florida Atlantic University

BS in Accountancy

University of Illinois - Champaign, IL

Skills

- Tax Experience
- QuickBooks

Certifications and Licenses

CPA

Assessments

Principles of Accounting — Highly Proficient

September 2019

Preparing financial records according to federal policies.

Full results: [Highly Proficient](#)

Work Style: Conscientiousness — Familiar

May 2019

Measures a candidate's tendency to be rule-abiding, well-organized, hard-working, confident, and think before acting.

Full results: [Familiar](#)

Indeed Assessments provides skills tests that are not indicative of a license or certification, or continued development in any professional field.

Additional Information

Proficient in Gosystem, CCH, Lacerte