

# Julian Peters

Merced, CA 95340

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+1 209 947 5925

Authorized to work in the US for any employer

## Work Experience

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### **Tax Advisor**

LegalZoom Tax

November 2022 to May 2024

- Tax & Financial Counseling & Advice
- Quarterly Tax Estimate Preparation
- Annual Tax Preparation
- Daily client telephone interaction
- New hire training/guidance

### **Enrolled Agent**

Julian Peters, Enrolled Agent-Merced, CA

January 2013 to November 2022

- Preparation of Personal & Business Tax Returns
- Bookkeeping
- Payroll Compliance
- Tax Law Research

### **Graphic Designer & Sign Contractor**

King Signs & Graphics Inc.-Merced, CA

February 2005 to December 2020

- Graphic Design
- Sign Installation
- Customer Service
- Sales
- Management

## Education

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### **Master of Science in Accounting**

Liberty University

January 2019 to March 2021

### **Master of Arts in Executive Leadership**

Liberty University

January 2018 to December 2019

## **Bachelor of Science in Interdisciplinary Studies**

Liberty University - Lynchburg, VA

January 2014 to December 2017

### Skills

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- Tax Preparation, Planning & Advising (7 years)
- Tax Software, Online & Desktop (7 years)
- Cloud based Accounting Applications (6 years)
- Advanced Communication Skills
- Insurance Sales (1 year)
- Real Estate (2 years)
- Microsoft Office (5 years)
- QuickBooks Online (5 years)
- Bookkeeping (7 years)
- Financial Services
- Accounts Payable
- Workers' Compensation
- General Ledger Accounting
- Journal Entries
- Door-to-Door Experience
- Account Reconciliation
- Bank Reconciliation
- Accounts Receivable
- Payroll
- Loan Officer Experience
- Office Management
- Research
- Analysis skills
- Financial report writing
- Financial statement preparation
- Adobe InDesign
- Adobe Creative Suite
- Adobe Photoshop
- Proofreading
- Management
- Adobe Illustrator
- Human resources
- Accounting software
- Marketing (5 years)

- Print advertising (5 years)
- Business analysis
- Loan Origination
- Branding
- Communication skills
- Sales
- CRM software
- B2B sales
- Time management
- Leadership
- Computer literacy
- Writing skills
- Analysis skills
- Customer service
- Interviewing
- Research
- Business development
- Marketing
- Human resources
- Sales
- Accounting
- Financial services
- B2B sales
- CRM software
- Financial statement preparation
- Payroll
- Tax experience
- General ledger accounting
- Accounting software
- Insurance sales
- Adobe Photoshop
- Bookkeeping
- Adobe Creative Suite
- Graphic design
- Balance sheet reconciliation
- Door-to-door
- QuickBooks
- Outside sales
- Communication skills

## Military Service

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**Branch: US Navy**

Service Country: United States

Rank: E-5

August 1997 to August 2003

Top of the class Navy Electronic Technical Core (NETC) student and sailor, resulting in achieving the rank of E-5 in only 24 months. Excelled during MK Phalanx CIWS-45 "C" School achieving top of class with choice of orders.

## Certifications and Licenses

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**Real Estate License DRE#02075665**

January 2019 to January 2026

**Mortgage Loan Originator NMLS #249596**

January 2019 to December 2024

**Enrolled Agent**

February 2008 to Present

**Accident & Health Insurance License**

October 2018 to October 2024

**Life Insurance License**