

Lesley Ard

Tax Preparer

Mount Vernon, MO 65712

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1. Seeking employment in either a remote or office setting.
2. Have 8 years of experience in Tax preparation.
3. Can start ASAP.
4. Willing to learn a new trade.
5. Willing to do Remote Work
6. Willing to do Hybrid Work
7. Willing to do Contract Work
8. Take classes for a new job.
9. Using LinkedIn training and Classes to improve myself.
10. Tax software I am able to use Drake, CCH, and TaxAct Pro.
11. Bookkeeping Software, Wave, Kashoo, Xero, and Quickbooks.
12. Willing to travel to Office for 7-10 days out of the month.

Willing to relocate to: Missouri - Arkansas

Authorized to work in the US for any employer

Work Experience

Owner

Lesley A's Taxes-Mount Vernon, MO

January 2021 to October 2022

1. Owner of Lesley A's Taxes.
2. Fill out and File 1099's and W2
3. Prepare everything from Simple Returns to Schedules C, F, E,
4. Prepare S Corp's, and Partnership returns.
5. Managed daily operations for Customer Service.
6. Ensured all compliance and tax laws were followed
7. Set prices for all returns.
8. Verified all documents for proof of identity.
9. Verified all returns before they were sent off.
10. Reviewed all returns with clients.

Tax Preparer

Baker Tilly US-Orange County, CA

January 2022 to April 2022

1. Filed tax returns for the Western Coast of the US.
2. Worked mainly with CA returns.
3. Worked on Individual and 1120S returns.
4. Had daily Team Meetings.

5. I myself studied and got updated on CA Tax Laws.

Tax Preparer

Sexton & Associates-Mount Vernon, MO

January 2021 to March 2021

1. Filed 1099's
2. Prepared Individual and Farm Returns. (About 50 Farm)
3. Contacted clients by email and by phone for more information.
4. Left because of Medical reasons

Lead Preparer/Office Manager

Liberty Tax Service (D&D Tax and CPA)-Republic, MO

February 2015 to August 2020

1. Was Office Manager, and Lead Preparer.
2. Prepared an assortment of Returns,
3. 1040's, with Schedules, A, B, C, D, E, F. 1065s, and 1120-S.
4. Ordered Office Supplies
5. Set Appointments
6. Worked on Payroll
7. Printed Early Refund Checks, (verified they went to the proper person)
8. Hired Employees
9. Stayed up to date with the latest tax laws
10. Customer Service
11. 10 Key
12. Data Entry
13. Went to various tax conferences to gain CE credits, also studied online for CE
14. Did Monthly GRRs (Gross Recorded Receipts) to ensure office books were in balance.
15. Verified Id's.
 - Collected payments
 - Managed office supplies
 - Hired and mentored employees

Education

NA in Bookkeeping

US Career Institute - Fort Collins, CO

July 2021 to Present

GED in General

Clinton High School - Clinton, AR

August 1984 to April 1987

Skills

- Tax experience, (8 years)
- Payroll (2 years)

- Kashoo Accounting (2 years)
- Office Management (5 years)
- QuickBooks (2 years)
- Bookkeeping (2 years)
- Accounts Receivable (4 years)
- Accounts Payable (4 years)
- Data Entry (8 years)
- shopping (4 years)
- accessories (4 years)
- Customer service (7 years)
- 10 key typing (8 years)
- Personal assistant experience (4 years)
- General Ledger Accounting
- General Ledger Reconciliation
- Journal Entries
- Bookkeeping
- Payroll
- Tax experience
- General ledger reconciliation
- Accounts payable
- Personal assistant experience
- Data collection
- Typing
- Google Docs
- Proofreading
- Cash handling
- General ledger accounting
- Debits & credits
- Xero
- QuickBooks
- Research
- Office management
- Accounts receivable
- Account reconciliation
- Documentation review
- Retail sales
- Mobile applications
- Tax accounting
- Accounting

Languages

- English - Fluent

Links

<https://www.linkedin.com/in/lesley-ard-0a9440142/>

Certifications and Licenses

PTIN

December 2023 to December 2024

1. Yearly IRS PTIN.

Assessments

Retail customer service — Proficient

February 2023

Responding to customer situations in a retail setting

Full results: [Proficient](#)

Filing & organization — Completed

February 2023

Arranging and managing information or materials using a set of rules

Full results: [Completed](#)

Bookkeeping — Proficient

February 2023

Calculating and determining the accuracy of financial data

Full results: [Proficient](#)

Management & leadership skills: Planning & execution — Proficient

February 2023

Planning and managing resources to accomplish organizational goals

Full results: [Proficient](#)

Office manager — Completed

March 2023

Scheduling and budgeting

Full results: [Completed](#)

Administrative assistant/receptionist — Completed

February 2023

Using basic scheduling and organizational skills in an office setting

Full results: [Completed](#)

Sales skills — Proficient

February 2023

Influencing and negotiating with customers

Full results: [Proficient](#)

Typing — Completed

February 2023

Transcribing text

Full results: [Completed](#)

Data entry: Attention to detail — Completed

May 2023

Maintaining data integrity by detecting errors

Full results: [Completed](#)

Work motivation — Proficient

February 2023

Level of motivation and discipline applied toward work

Full results: [Proficient](#)

Business math — Proficient

February 2023

Using basic math to solve problems in a business context

Full results: [Proficient](#)

Attention to detail — Proficient

February 2023

Identifying differences in materials, following instructions, and detecting details among distracting information

Full results: [Proficient](#)

Managing accounts in QuickBooks — Proficient

February 2023

Using QuickBooks software to manage business financials

Full results: [Proficient](#)

Work style: Reliability — Completed

May 2023

Tendency to be reliable, dependable, and act with integrity at work

Full results: [Completed](#)

Principles of accounting — Proficient

February 2023

Preparing financial records according to federal policies

Full results: [Proficient](#)

Project timeline management – Completed

February 2023

Prioritizing and allocating time to effectively achieve project deliverables

Full results: [Completed](#)

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

Groups

NATP

March 2018 to Present

1. Member of NATP. Take the online training and Tax updates.