Prixie Dinkens

3824 Cedar Springs. Rd. # 556 Dallas, TX 75219
(877) 739-8846 cell pmde10@yahoo.com

Overview:
An organized, detailed-oriented and dedicated professional with experience in Accounting, Administration, Auditing Insurance, Management Consulting, Mortgage Operations and Taxation services. Competencies include: Business Development → Compliance → Client Interactions (Internal & External) → Credit → Effective Time and Portfolio Management → Human Relations → Exceptional Analytical skills → Communication skills (oral & written) → Reporting → Research abilities → Leadership / Supervisory → Taxation → Team Building

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PTIN P00411935, **MBA**, TX Womans University, **B.S. Degree**, Wiley College

Leadership: Former President of Undergraduate Sorority (3 yrs), Peer Counselor & Tutor (5 yrs), Team Captain, Inter-Collegiate Basketball & Softball (4 yrs), Secretary of Undergraduate Sorority (1 yr)

Experience:
Credit Analyst III, First Republic Bank, San Francisco, CA via LHH (subsidiary of Adecco Professional Group), Remote
03/22 – Present

- Underwrite Unsecured New & Modification loan apps for Domestic & Foreign High Net Worth earners under the Professional Loan Program vertical
- Calculate income via pay-stubs, compensation summaries, K1s, Evaluate liquidity statements
- Convert foreign currency via xe.com as applicable
- Pull credit reports to ascertain borrower's credit worthiness
- Determine real estate values via House Canary, Zillow, Red Fin or Zoopla for UK Borrowers, and confirm Vesting via Data Tree
- Based upon production and quality of files, appointed by Sr. Management as a Subject Matter Expert who train new hires, perform pre-review critique of Credit Memos of peers prior to final review by the Corporate Analyst team, and serve as a mentor and resource for colleagues
- Vet each file by completing KYC and Red Flags (clear as applicable) as part of the loan process
- Interact with the Associates and Relationship Managers to request additional documentation required for a full application, including Trust Certificates and Trust Information Forms
- Calculate required liability payments as necessary to ensure the debt is serviced (i.e. student loan payments in deferment, lines of credit that are currently undrawn, property taxes and homeowners insurance if not escrowing, etc…)
- Write quality Credit Memos and submit to the Executive Loan Committee for final determination
- Extend Counter-Offers as applicable
- Adhere to department policies and procedures, Perform UCC searches as applicable
- Other duties as assigned

02.22 – Present, Minerva Cuellar, CPA, San Antonio, TX, Remote
Tax Preparer

- Review client questionnaire to ascertain tax return form requirements - all entity types & states
- Examine tax documents to determine if additional data is required from client
- Prepare tax return with close attention to tax saving strategies
- Prompt client for additional data to ensure adherence to guidelines
- Utilize strong knowledge in tax law
- Detail and deadline-oriented
- Apply analytical and problem solving skills
- Effectively communicate with clients both verbally and written

01/02 – Present**,** V C Group, Dallas, TX, Remote
Senior Professional Services Consultant & Tax Manager/Advisor
Business:

- Accountable for all Administration, Customer Service, Fiscal, Operations and Management aspects of the firm, Coach businesses on Organizational Structuring and Funding Options
- Manage 10 to 50 staff level associates, Source applicants, develop and train new hires
- Ensure Compliance & governance with Federal, State & Local municipalities, Policy implementation, Internal control and Issue/Problem Resolution, Internet Research

- Prepare and review Proposals, Create spreadsheets for reporting purposes, Prepare PowerPoint presentations
- Maintain files & data entry of confidential records and accounts
- Work in a highly organized manner to meet time sensitive deadlines

Taxation:

- Serve the public by preparing Federal 1040, 1065, 1120 C & S Corps, 1041 and 990, Franchise, Property, Sales and Use, Multi-State, Quarterly and Franchise Tax Returns
- Follow IRS Circular 230 and abide by tax laws & regulations to prevent the submission of fraudulent returns
- Research tax issues and assist clients with tax planning
- Use allowable credits, deductions and adjustments to keep tax liability to a minimum
- Interview clients, Handle confidential data, Act as a 3rd party rep to resolve IRS notices and help clients prepare for Audits
- Review & analyze new clients prior year's return for accuracy in reporting
- Update system & run diagnostic reports, Process W2s, W4s, 1099s and submit 1096 wage reports, Process W7s via partnership with an Acceptance Agent, Extend filings by submitting forms 4868 & 7004 as necessary

Accounting:

- Ensure compliance with regulatory agencies
- General ledger, Bank Reconciliations, Profit and Loss Statements
- Risk and Financial analysis, A/P and Invoice processing, Chart of accounts set-up
- Travel & Expense reporting, Payment remittances & delinquent account collections, Payroll processing
- Budgeting, Sales & Use tax returns, Cash handling, Credit & Debit Cards and Pay-pal processing
- Reporting, Auditing of records, File maintenance, Month End Closing

02/2020 – 04/2020, Exencial Wealth Advisors via Unity Search, Frisco,TX & Remote
Seasonal Tax Consultant

- Prepared a large volume of tax returns for high-net worth individuals, trusts and estates that varied in complexity
- Cleared diagnostics errors prior to submitting a return to the review pool
- Interacted frequently with Advisors to request missing documentation to complete the tax returns

01/06 – 01/07; 09/11 – 10/18**,** U. S. Small Business Administration, Multiple roles, Ft. Worth, TX
Credit Analyst / Underwriter

- Processed and Underwrote Auto, Flood, FHA, FNMA, Freddie Mac and Conventional Property & Business Interruption loans
- Effectively manage pipeline within the required timeline to decision applications as Approved, Declined or Withdrawn
- Ensured Compliance with Congressional & Agency guidelines
- Evaluated Credit Reports, Dun and Bradstreet Reports to ascertain Credit Worthiness
- Calculated income to debt %
- Confirmed Assets & Reconciled Liabilities
- Verified income via Tax Transcripts (Form 1040, 1065, 1120 C & S Corps, K1s), P / L Financial Statements Paystubs, Employment checks W2s
- Requested outstanding docs, Disclosed loan terms, stipulations & insurance requirements
- Responded to inquiries from borrowers, their representatives or public officials concerning loan status
- Explained reasons for declines or withdrawals & advised on how to overcome the adverse decisions
- Assisted with training (on the job) less experienced Credit Analysts / Underwriters

Accomplishments: Assigned to special projects based upon meeting / exceeding production standards. Received commendation letters from the public for superior customer service

Case Manager / Paralegal Specialist II, U. S. Small Business Administration, Ft. Worth, TX

- Assisted attorneys by reviewing legal documents in the claims settlement phase
- Conducted research on state laws regarding statutes, ordinances, regulations & policies
- Audited files to ensure they contained accurate data and to prevent fraud
- Interacted with the insured frequently & advised on the disbursement process
- Issued Initial payments of $25k and Supplemental payments
- Discussed suspect claims with Attorneys for appropriate legal actions
- Worked in an organized manner to timely manage the caseload and meet production goals

Other Related Work:
08/05 – 12/05, **Office Manager/Staff Tax Preparer and Accountant,** Mr. Tax International, Inc, Richardson, TX

09/03 – 02/04 **Contract Commission Analyst / Sales Support,** Intuit, Plano, TX

01/98 – 04/02, **Tax Preparer / Customer Service,** Jackson Hewitt Tax Service, Dallas & Garland, TX

Technical:

Microsoft Office Applications, AS 400, SAP, Siebel, Tax Software include: CCH Axcess and Taxwise, ProSeries, Intuit Tax Online, Olt Pro, Lacerte, TaxAct & Drake, Accounting Software include: AccPac, EZ Accounting, Peachtree and Quickbooks 10k+ ksph, type ≈ 55 wpm – 75 wpm