

Robert A. Perry

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OBJECTIVE

A challenging position fully utilizing superior skills in finance and investments, which will ensure business growth.

EXPERTISE

Jan 2024 - May 2024 Swinarski & Co CPA Firm Prepared Individual and Business Tax Returns

Aug 2023-Dec 2023 Auto Service Department - West Palm Beach Worked as a Fronter for Auto Warranties

May 2023 - July 2023 Tax Help MD Palm Beach Gardens - Tax Preparer of 1040 & 1120s tax returns. Company did not have adequate marketing and sales team to generate enough business

Feb 2022 - May 2023 Worked in a number of local CPA Firms preparing 1040, 1120S, 1120,1065 and 1041 tax returns Was basically a seasonal job and firms were unable to offer year round full time employment. Swinarski & Company Palm Springs which included the 2020,2021,& 2023 tax seasons, Boyer & Ginori CPA West Palm Beach for the 2022 tax season.

Aug 2021 - Feb 2022 Tax Preparer - Justice Tax - Prepare 1040 tax returns for a tax resolution firm

Jan 2019 - Jan 2021 Various call center jobs selling health insurance, auto warranties student loans

Oct 2018 - Dec 2018 Ican Benefit Group - Present Health insurance Agents with both the private insurance market and Obamacare

August 2018 - September 2018 Health Insurance Direct Sold private health insurance to the under 65 market

June 2018 -July 2018 - Studied for and acquired my 2-15 License

Medical Funding Affiliate April 2018 - Present - With a pool of investors fund the marketing operations for medical funding company called The Medical Funding Hub

National Health Agents April 2018- June 2018 Worked as a Fronter for Private Health Insurance

Creative Tax Solutions June 2016 - December 2017 - Prepared 1040 Tax Returns

Peoples' Tax Relief May 2015 - June 2016 - Prepared 1040 Tax Returns

Palm Beach Tax Advisors (Franchise of H&R Block) Nov 2014 - Feb 2015 - Prepared 1040 Tax Returns

Distributor Discount Drug Network May 2014 - Oct 2014 - Distribute free discount prescription cards and recruit other distributors

Tax Preparer Jackson Hewitt North Palm Beach County are Feb 2014 - March 2014
Provide outstanding and extensive customer Service/relations in tax preparation in fast paced environment

Lotto Magic July 2013-May 2014 Present Recruit members to join lottery membership club.

Ican Benefit Group April 2013 - June 2013
Health Insurance Agent Sell health insurance over the phone.

Self-Employed April 2010 - April 2013

Includes being a investor, trader and venture capitalist. Recently funded the US Branch of Vertue Trading which teaches members how to trade the forex market

Tax Specialist H&R Block Boynton Beach, FL District
Nov 2008 - April 2010

Provide outstanding and extensive customer Service/relations in tax preparation in fast paced environment. Assist and coach new personnel.

INTERMEDIATE TAX ACCOUNTANT

Thomson Tax & Accounting, Richmond, VA
Oct. 2006-Jan 2008

- Manage over 1,300 tax accounts for Stock Yards Bank & Trust Co, Cypress Trust Company, and Bank of Edwardsville, preparing 1041, and 1099 taxes, consisting of grantor trusts or agent custodian, as well as some 1040s for M&T Bank.

TRUST TAX ADVISOR

Wachovia Bank, Charlotte, NC
2002-9/06

- Prepared 1099 agency custodian accounts for 2,300 clients. Assisted with 1041 grantor accounts and managed special projects.

TAX SERVICE SPECIALIST & OFFICE MANAGER 2000 - 2002

H&R Block, Orlando, FL

- Provided outstanding and extensive customer service/relations in tax preparation. Interview clients and prepare returns in a high-volume, fast paced environment. Coach and assist new personnel.

- Coached/mentored 6 staff members by clearly explaining and demonstrating proper applications of software. Result: Improved staff productivity, efficiency and morale.

TAX ADMINISTRATOR
1998 - 1999

SunTrust Bank, Orlando, FL

- Conducted initial analysis and preparation of 1041 income tax returns of Trust and Estate accounts. Prepared 990-PF and 1099 returns. As Tax Officer, was authorized to co-sign check requests for support personnel. Utilization of TRUSTEASE software and AMDESTOP accounting system.

FIDUCIARY TAX ADMINISTRATOR
1990 - 1998

First Union Bank (formerly First Fidelity Bank), Philadelphia, PA

- Prepared basic 1041 tax returns (including reviewing transactions to proper tax code) as well as death of a beneficiary accounts and some complex 100 accounts. Assisted co-workers in use of Omega Tax system and performed tests on system to ensure proper functioning of tax codes. Responded to IRS inquiries and charged tax service fees.

- Efficiently prepared 2000+ tax returns within 1 year by accurately reviewing/assessing and expertly utilizing tax software program. Result: Met all deadlines and performance standards.

TAX ACCOUNTANT
1987 - 1990

Wolf, Block Schoor & Solis-Cohen, Philadelphia, PA

- Maintained ledger accounts and prepared trust/estates 1041, 990-PF, personal property tax returns. Assisted in calculation of quarterly estimated taxes.

EDUCATION/TRAINING/LICENSES:

- BA in Accounting, Rutgers University
- Completed 10 week course thru Liberty Tax Nov 2013
- Investment, Stocks, Bonds & Mutual Funds
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Computer Skills: Omega and HR Block Tax Software programs by intense concentration, disciplined practice and self-directed management.
Result: Improved production by 100% and exceeded customer expectations.