

**Ronald Cozart**  
**104 sharpstone bend, Stockbridge, GA, 30281**  
**929-319-7590**  
**cozartbuildings@gmail.com**

Objective: To obtain a position utilizing my public accounting, Excel, tax preparation, and bookkeeping skills Working Remote from home office.

### **Education:**

- Series 7 and 63 Investment banking and Global Finance License 2011
- Real Estate Brokerage license, NY and GA 2013
- Intuit Tax Preparation Certificate (40 Hour) 2018
- Intuit Bookkeeping/ Public accounting Certification (30 Hour) Completed 2019
- Intuit Quickbooks Certification 2018
- Obtaining EA (Enrolled Agent) Certification with Fast Forward Academy Online to be completed JULY 21,2023.

### **Skills:**

- Proficient in Excel (including VLOOKUP, PivotTables, and macros)
- Experience with tax preparation software such as TurboTax and Drake Tax and other Tax Software
- Knowledge of Generally Accepted Accounting Principles (GAAP) and Generally Accepted Auditing Standards (GAAS)
- Familiarity with QuickBooks and other accounting software
- Strong attention to detail and organizational skills
- Excellent communication and interpersonal skills
- Extensive knowledge of IRS Corporate tax laws
- Public accounting for Large and Small Business
- Public accounting for Self employed 1099 contractors
- Investment banking knowledge
- Booking keeping for small and large businesses,

### **Experience:**

#### **Corporate and Personal Tax Preparer**

**HR Block, Atlanta , GA 2022** Offered clients recommendations to reduce tax liabilities.

Contacted IRS or other relevant government organizations on behalf of client to address issues related to tax self-preparation. Reviewed clients tax filing papers thoroughly to determine eligibility for additional tax credits or deductions. Maintained complete records of client tax return and supporting documentation in secured areas. Provided information about available products and services to clients, resulting in increased business opportunities. Facilitated communication between clients and tax authorities. Delivered comprehensive tax documentation required for accurate individual and corporate returns. Public accounting and bookkeeping for small and large Business.

### **Jan 1 2020- Nov 15 2022**

- Prepare and review financial statements and tax returns for individuals, partnerships, and corporations
- Maintain accurate records of financial transactions using QuickBooks and Excel
- Communicate with clients to provide advice on tax and accounting issues
- Perform bookkeeping services, including accounts payable and accounts receivable management

### **Liberty Tax Service, New York, NY**

#### **Feb 15 2018- Dec 31 2020]**

- Prepared and reviewed tax returns for individuals and businesses
- Conducted audits of financial statements in accordance with GAAS
- Assisted with the preparation of financial statements and other reports
- Performed bookkeeping services and Public accounting and maintained accurate records of financial transactions

### **HUDSON CROWD FUND, Real Estate Broker , Stockbridge GA**

- Conducted market research and analysis to identify new business opportunities and market trends
- Managed a team of real estate agents, providing coaching, support, and training to ensure high performance and productivity
- Developed and implemented marketing strategies to promote the company's services and listings
- Maintained accurate records of transactions and ensured compliance with state and federal real estate laws and regulations

- Negotiated contracts and agreements on behalf of clients, including purchase agreements, leases, and rental agreements
- Assisted clients with the buying, selling, and leasing of properties, including conducting property viewings and inspections, and preparing and presenting offers
- Collaborated with other real estate brokers and agents to identify and close deals
- Maintained strong relationships with clients, vendors, and industry professionals

**[Dec 2014- Feb 1 2018 ]**

**John Thomas Financial , Investment Banker, NY, NY**

- Conducted financial analysis and due diligence to assess potential investment opportunities, including mergers and acquisitions, leveraged buyouts, and debt and equity offerings
- Prepared and presented financial models, including valuation analysis, to clients and senior management to support investment recommendations and decision-making
- Assisted in the preparation of confidential information memorandums and other marketing materials for potential investors and buyers
- Conducted industry research and analysis to identify and evaluate potential acquisition targets and market trends
- Collaborated with cross-functional teams, including legal, accounting, and tax professionals, to ensure compliance with legal and regulatory requirements
- Conducted financial analysis and prepared detailed reports on the financial performance of companies and industries
- Worked closely with senior investment bankers to develop and execute transaction strategies and negotiate deal terms
- Maintained strong relationships with clients and industry professionals to ensure ongoing success and growth of the business

**April 2009- Jan 2014**

Available upon request.