

# WILLIAM PEREZ

## Lead Tax Consultant

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### PROFESSIONAL SUMMARY

Tax Consultant with a decade of experience in tax compliance and strategy formulation. Skilled in leading teams to navigate complex tax regulations while maximizing client savings. Committed to fostering strong client relationships and delivering innovative solutions to enhance financial outcomes.

### WORK EXPERIENCE

#### Lead Tax Consultant

Pineapple Enterprises

📅 May / 2018-Ongoing  
📍 Santa Monica, CA

1. Prepare and oversee the preparation of complex tax returns for individuals and businesses.
2. Utilize various adjustments, deductions, and credits to minimize client tax liabilities.
3. Conduct comprehensive client interviews to gather necessary financial data.
4. Review and analyze financial records to determine appropriate tax documentation.
5. Provide clients with accurate guidance to facilitate correct tax form completion.
6. Verify data accuracy and compliance in tax filings.
7. Lead tax advisory sessions to educate clients on tax strategies.

#### Tax Consultant

Cactus Creek Solutions

📅 May / 2015-May / 2018  
📍 Phoenix, AZ

1. Managed quarterly payroll, sales, corporate, and individual tax filings.
2. Conducted bookkeeping and payroll processing for various clients.
3. Researched current tax legislation and financial regulations.
4. Analyzed financial accounts to ensure accuracy and compliance.
5. Collaborated with clients to gather audit information and financial records.
6. Prepared year-end tax documents, including W-2 and 1099 forms.

### EDUCATION

#### Bachelor of Science in Accounting

University of Chicago

📅 May / 2012-May / 2015  
📍 Chicago, IL

Completed coursework in tax law, auditing, and financial reporting.

### SKILLS



### ACHIEVEMENTS

- ★ Streamlined tax preparation processes, reducing turnaround time by 20%.
- ★ Achieved a 95% client satisfaction rate through effective communication and timely service.
- ★ Identified tax savings of over \$500K for clients through strategic planning.