

AMRITA PHILIP
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EDUCATION

UNIVERSITY OF HOUSTON, C. T. BAUER COLLEGE OF BUSINESS, Houston, TX **May 2022**
Master of Science in Finance, GPA: 3.948/4.0

- Certificate in Wealth Management

SHARJAH COLLEGE, AMERICAN UNIVERSITY OF ASIA, U.A.E **May 1999**
Bachelor of Business Administration

- Finance, GPA: 3.98/4.0

EXPERIENCE

LIBERTY TAX SERVICES, Cypress, TX **2013-Present**

Senior Tax Preparer (2013-Present)

- Prepared accurate income tax returns and operated proprietary tax preparation software
- Maintained small business accounts for multiple clients in accordance with GAAP
- Managed office premises as required and ensured smooth running of operations
- Resolved tax issue for clients by helping respond to IRS letters
- Mentored and trained new hires while ensuring a smooth transition while learning new office procedures
- Analyzed office processes to increase efficiency and maximize productivity
- Created a productive and amiable work environment, embracing team work
- Met tax deadlines working closely with tax team while dedicated to delivering client satisfaction

Trained Tax School Instructor (2015-Present)

- Taught a 10 week Tax School at Liberty Tax every year, covering basics of tax law
- Utilized impressive communication and presentation skills to make complicated concepts easily understandable to students
- Instructed new tax preparers in tax law, coaching new employees to use tax software
- Trained new hires to provide best customer service while ensuring adherence to internal controls

Bookkeeper (2014-Present)

- Advised clients regarding upcoming tax laws and changes, addressing any queries and concerns
- Studied company financial statements and provided financial reports for senior management clients
- Analyzed reports and managed tax planning to help clients save on taxes in following year
- Created chart of accounts and posted daily journal entries in Quick Books for small businesses
- Generated Profit and Loss and Balance Sheet statements to feed into corporate tax return

ADDITIONAL DATA

Additional Certifications

- Working towards becoming an Enrolled Agent with IRS by March 2022. Passed Part 1 and 3 of SEE exam.
- Annual Filing Season Program (AFSP) Certification with Internal Revenue Service
- Certifying Acceptance Agent with IRS

Proficient in Quick books, Fusion Tax Software, Microsoft Office Suite

Volunteer, Lay minister and Weekly Bible study leader at City Church, Houston (2008-present)

- Author of Bible Study books