

# FNAME LNAME

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## ACCOUNTING EXECUTIVE

*Ad Valorem Taxation ✧ Federal/State Taxes ✧ Consulting*

Combine astute strategic, business, and analytical skills with a 20 year track record of resolving high profile real and personal property tax audits. Expertise in garnering the financial and operational documentation/data necessary to defend the company with state and local auditors. Able to manage diverse personalities in the appeals process, so that the appropriate tax result is achieved. Experienced portfolio manager, will aid in or prepare tax accruals and provide guidance and documentation for accrual compliance/management. Skilled negotiator, will undertake complex projects with political problems and produce settlements advantageous to the company and local officials. Consistently recognized by executive management for talents in troubleshooting, innovative problem resolution and process improvement. Extremely competent at including the human element when assessing situations, operations and processes. Decisive, versatile and used to multitasking.

## KEY ACCOMPLISHMENTS

- ✓ Resolved high profile personal property tax audits leading to tax refunds of up to \$18 million.
- ✓ Generated tax savings of up to \$20 million by gathering/assembling financial/operational/legal evidence to partially negate large audit assessments.
- ✓ Achieved tax refunds and tax savings of up to \$25 million by preparing valuation/operational/financial data to appeal real estate valuations.
- ✓ Created tax savings of up to \$15 million by negotiating tax abatements with state and local officials.

## PROFESSIONAL EXPERIENCE

Deschmidt & Associates, Inc., Cincinnati, Ohio

2001 – 2010

### MANAGER, PROPERTY TAXES

Recruited as a tax consultant with responsibilities for clients real and personal property in Ohio and Michigan. Managed clients property portfolios for tax cycled reviews. Accomplishments/Projects included:

- ◆ Generated a Report of Findings after a physical review of a client's property by analyzing financial, economic, sales and income data. Negotiated audit settlements with state and local taxing authorities on client's personal property filings; developed approved informal valuations on real property.
- ◆ Spearheaded the handling of a client's formal and informal appeals process to a final conclusion. Engaged appraisal firms and retained attorneys for client representation at a formal Board of Revision and Court of Appeals hearing.
- ◆ Directed clients in their application for abatement and exemption. Provided accounting for fixed assets, tax accruals and property tax issues.
- ◆ Aided companies in securing and maintaining Foreign Trade Zones (FTZ) status, allowing realization of substantial tax relief, duty refunds and other savings opportunities.

Credit, Inc., Cleveland, Ohio

1990 – 2001

### PROPERTY TAX MANAGER

Charged with the responsibility for North American real and personal property taxes, served as the in-house expert on valuation issues, tax laws, rulings, court cases, legislation and provided technical input for tax abatement and tax legislation. In addition:

- ◆ Coordinated the activity of outside appraisers, attorneys and other tax professionals while directing the administrative filing of protests, appeals and Court of Appeals actions when warranted.
- ◆ Initiated the systemic cycled review of all real and personal property at all of Credit, Inc's North American locations.

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**PROFESSIONAL EXPERIENCE FOR TRW INC. (CONTINUED)**

- ◆ Drafted and implemented procedures to ensure timely legal compliance with property tax return filing deadlines; directed and defended TRW's audits of personal property with taxing authorities.
- ◆ Reviewed company real and personal property fair market values to ensure conformity with existing tax laws; prepared necessary appraisal and market value data to challenge inappropriate values and negotiate settlements.

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**PREVIOUS PROFESSIONAL EXPERIENCE**

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*Shell Oil Company, Cincinnati, Ohio (1983 – 1990)*

***Manager, Ad Valorem Taxes***

*National Steel Corporation, Cincinnati, Ohio (1969 – 1983)*

***Tax Agent***

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**EDUCATION**

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***Bachelor of Science, Accounting, magna cum laude***

*Dyke College (David N. Myers College)*

***LLB Degree***

*LaSalle Extension University*

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**CERTIFICATIONS / PROFESSIONAL AFFILIATIONS**

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- ◆ Tax/valuation courses from the Institution of Professionals in Taxation (IPT) and the International Association of Assessing Officers (IAAO). Hume real estate course. Various Foreign Trade Zone courses.
- ◆ Designations - IPT – CMI (Certified Member of the Institute). Chaired various committees, IPT Instructor at several schools and symposiums and instructed Ohio Tax Professionals group.