

Education/Qualifications

- Carlson School of Management, Master of Business Taxation (2013)
- CPA
- University of St. Thomas, BA Accounting and Entrepreneurship (2008)

Areas of Degree Focus

- Corporate Taxation:
- Tax Research
 - Accounting for Income Taxes (ASC740/FAS109)
 - Mergers and Acquisitions
 - Consolidated Corporate Taxation
 - State Taxation
 - International Taxation

Areas of Experience Focus

- Tax and Accounting Technology
- Compliance and Planning Focused
- Tax Authorities

Industry Experience

- Consulting Services
- Real Estate
- Distribution Services
- Education Services
- Manufacturing

Tax Applications

- Corptax (ETS)
- UltraTax
- ProSystems (Global fx)
- GoSystems
- Others

Accounting Applications

- MS Dynamics Great Plains
- QuickBooks

Other

- Outstanding Computer Abilities, especially Excel
- Budgets and Financial Statements
- Accounting, All Areas
- Advanced Bronze Ballroom Dancer
- Grew group of 400 people to 5,000 in 12 mos. by hosting events

Summary

An accomplished Big Four Tax, Accounting, and Consulting professional with demonstrated technical, business, and flexible expertise. Extensive experience in preparing, reviewing, and planning corporate, partnership, and individual taxation. Other areas include budgeting, all areas of accounting, and process development. Education is corporate tax focused.

Experience

Star Tribune Media Company - Senior Tax Accountant - Aug 2014 to Current Corporate Tax – News and Media Industry, Including Newspaper Manufacturing

- Write tax research memos, when appropriate (available upon request)
- Guide business decisions by projecting tax impact
- Upon review of prior returns, inquired about and initiated § 199 utilization
- Created method, process, & optimized reasonable method to maximize DPAD
- Respond to income tax authority notices
- Organize info for provision, review outside CPA's provision and returns
- Respond to ad hoc tax questions
- Other corporate accounting duties that are aided by tax background

Sundberg Tax & Consulting - Primary Tax & Business Consultant - 2010 to Current Public Accounting - Self Owned

- Prepare and review tax returns for businesses and individuals with multi-state tax nexus
- Extensive experience with IRS Appeals, Appeal Process, and IRS Procedure
- Created, organized, and maintain efficient tax return process

Completed projects include:

- As Contract CFO and Controller, developed processes for real estate investment company to increase efficiency and accuracy of all accounting and back-office work
- Worked with many clients to increase accuracy and efficiency of bookkeeping
- Represented clients during various IRS appeals and collections meetings, resulting in only favorable adjustments, deadline extensions, or no adjustments

Tax and Consulting Projects While Pursuing MBT

Dungarvin, Inc. - Tax Specialist and FE Controller - 2011 to 2012 Corporate Accounting - Varied Industries

- Planned and prepared 38-state, multi-entity business taxation for family enterprises
- Developed processes to organize accounting information with operating managers so accounting for transactions was routine, organized, and efficient
- Reduced accounting time requirements of position by 70%

Other Short-Term Opportunities while Building Practice and Pursuing MBT - Various Dates

Public Accounting

- Tax review, tax preparation, accounting, bookkeeping, cost accounting, and others

Experience before Pursuing MBT

Deloitte & Touche LLP -Tax Consultant - 2006 to 2009

Public Accounting

- Planned and prepared corporate taxation for public and private consolidated companies
- Developed many professional and quality standards that have distinguished work throughout career
- Became perpetually tax planning, liability-minimizing, and opportunity-minded, even when compliance-focused
- Demonstrated ability to understand, process, and use large volumes of detailed financial information
- Created tool to analyze public companies using 10-K to quickly find potential tax opportunities
- Became enthused with Corporate Taxation, resulting in enrollment in Master of Business Taxation program at the Carlson School of Management