



480.918.2561 ph./text
JamesInThePhilippines@gmail.com



Strengths

- 1040 30%
- 990 25%
- 941 30%
- 1120 15%

PTIN# P02385214 EIN#85-3497439

James Rose, *Independent Tax Preparer*

Overview of Tax Experience

- Prepare, eFile, **Individual & Business**/Corp. Federal And State Tax Returns
- **Maximize Client Refunds**/Credits Via Blueprint of Compliant IRS Advantageous Rules
- Review **Potential Tax Liabilities**, Income Statements, Expenditures, Deductions, etc.
- Explain In Simplified Terms “Tax Specifics” **Benefiting Clients Unique Circumstances**
- Abreast On **Latest Tax Laws**, Regulations, Compliance, Trends, Opportunities, etc.
- Manage & **Protect Accurate Client Records**, Transactions, Communications, & Sensitive Data
- Collaborate With **Team Members** To Augment Service To Exceed Client Expectations
- Cognizant of New Tax **Laws Passed In House/Senate** That Effects Client Refunds
- Grounded In Exceptional Communication Skills & **Easy To Approach Personality**
- Provide Five-Star **Superlative Concierge Style Services** To Each Client

Volunteerism / Accomplishments / Press Releases

- [McDonalds & Avion Healthcare Partnered For Free Covid Testing & Gift Cards 1200+](#)
- [John & Josephine Rose Foundation / Avion Healthcare Outreach Feeds 500+](#)
- [John & Josephine Rose Foundation / Avion Healthcare Outreach After Typhoon Odette](#)
- [John & Josephine Rose Foundation / Avion Healthcare Outreach at Global Youth Day Event](#)
- [James Rose, Host AG2G Podcast Helps Students With Scholarships To Become Nurses](#)

Articles ABC News Links

- [James Rose From Partner A Child Helps Teens With FREE Safe Rides](#)
- [Partner A Child Foundation Partners With Bank of America For DUI Program](#)

What I’m Looking For

Remote tax preparation work to fill my days in retirement. Experience and discipline is embedded in Individual (1040’s), Business (Sched. C’s), Corporate (1120’s), and Nonprofit (501c3’s) Quartley/Annually (941’s) state and federal returns. I am personally & professionally approachable, friendly, and communicate effectively with clients from all walks of life, and all levels of character.

Education / Experience

Rio Salado College. Tempe Arizona 2010 – 2021 **Conferred Bachelor’s Degree**

- Public Administration, Assoc. of Arts
- Certified Family Life Educator, CFLE
- Family Case Supervisor Behavioral Health
- State Certified Home Health Aide, HHA
- International Outreach Program Director