

Jennifer Howland

From: Traci Prochazka
Sent: Monday, September 26, 2022 10:37 AM
To: Jennifer Howland
Subject: Candidates

Hi,

1st – Kaleesha Lockinour
2nd – Diana Fessler
3rd – Andre Moore
4th – Lennette Pennington
5th – Therese Amick

Traci Prochazka
City of Bedford Tax
Tax Auditor
165 Center Road
Bedford, Oh 44146

Jennifer Howland

From: Keith Laffin
Sent: Monday, September 26, 2022 7:52 AM
To: Jennifer Howland; Allison Chance

Follow Up Flag: Follow up
Flag Status: Flagged

Top

Diana Fessler Best MITS experience – would be able to step in and make the most impact right away

Kaleesha Lockinour Would take her longer to get up to speed with our MITS system but should be able to help clean up the withholding and net profit accounts but maybe not until after April tax season

Andre Moore nice enough but strengths of first two stood out more

Therese Amick MITS experience was older and new changes to law since 2016 she has never experienced

Lennette Pennington nice enough but no real municipal income tax experience; clearly did not understand box 18, 19 and box 20 for muni taxes

Keith A. Laffin
Tax Collector/Collections Manager
City of Bedford Tax Department
165 Center Road
Bedford, Ohio 44146
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Forms and additional information
Available on our website: www.bedfordoh.gov

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20 yrs muni tax
pre and post 2016

Kaleesha Lockinour

Work Experience

Income Tax Collector

Regional Income Tax Agency - Brecksville, OH
June 2002 to Present

- Collect and prepare taxes from over 300 municipalities according to prescribed laws and regulations.
- Manage training for all new recruits during their initial six-month probation period and offer continuous advice, guidance, and mentorship on duties and best practices.
- Facilitate communication between clients and tax authorities.
- Analyze tax data and prepare statistical reports.
- Negotiate tax payment agreements within established guidelines.
- Review and correct W2 payroll errors according to local state laws.
- Co-author an improved billing program that reduced the amount of inaccurate billing statements.

Warehouse Associate

Amazon - Twinsburg, OH
June 2018 to September 2018

- Inspected incoming and outgoing shipments to verify accuracy and prevent errors.
- Organized stocks and maintained inventory.
- Used hand-held devices and computers to record and monitor inventory levels.
- Checked, verified, and filled customer invoices.
- Maintained safety regulations and compliance with all applicable regulations.
- Contributed to team effort by accomplishing related results as needed.
- Promoted a clean shipping supply area by complying with procedures, rules, and regulations.

Sales Associate

Kohl's - Macedonia, OH
May 2018 to June 2018

- Assessed customers' needs and provided assistance and information on product features.
- Responded to customer questions and assisted customers throughout the buying process.
- Operated cash register, managed financial transactions, and balanced drawers.
- Assisted with inventory, including receiving and stocking merchandise.
- Promoted special sales, offers and awareness of store loyalty program.
- Maintained an orderly appearance throughout the sales floor.
- Fulfilled online shopping purchases and prepared them for in-store pickup.

Education

John Marshall High School - Cleveland, OH

June 1992

Skills

- Data Entry
- Microsoft Office
- Customer Service
- Problem Solving
- Account Management
- Clerical Skills
- Analytical Skills
- Leadership
- Employee Training
- Negotiation
- Tax Experience
- Mentoring
- Lexis-Nexis
- Microsoft Excel
- Clerical experience
- English
- Typing
- Research

8 years muni tax
Pre + post 2016

Andre Moore

Income Tax Tracer/Auditor - City of Cleveland Finance Dept

To obtain a position within the Business field that offers advancement opportunities.

Work Experience

Tax Auditor

City of Cleveland Finance Dept - Cleveland, OH
July 2014 to Present

Verify income tax returns for mathematical accuracy.

- Total and correct income, place of employment, and residence.
- Code and batch income tax returns and verifies scanned payment information on CRT's.
- Receives and applies payment on delinquent accounts.
- Help taxpayers file city tax returns, in person and via help line.

Water Plant Operator I

City of Cleveland Water Dept - Cleveland, OH
January 2013 to July 2014

Assist in the operations of water works equipment including valves, pumps, and filters.

- Monitor equipment performance.
- Maintain records related to equipment operations.
- Monitor pumps and operations.
- Check chemical levels and refill chemicals as necessary.
- Follow all operations and safety policies and safe work practices.

Preservation Tech.

Lender Processing Service - Solon, OH
February 2012 to January 2013

Review loan history and determine if the property is vacant, requires securing and/or property preservation.

- Conducting database searches to compile information.
- Locating and abstract data from files and records
- Compiling workload and status reports.
- Research and report expenses related to Property Preservation.
- Perform any duties as instructed by management

Teller/Customer Relationship Specialist II

First Merit Bank - Cleveland, OH
December 2010 to February 2012

December 2010 - February 2012

Provide quality customer service to create a positive customer relationship while completing customer transactions timely and accurately.

- Handle thousands of dollars daily with no mistakes
- Exceed sales goals for opening new accounts
- Balance ATM
- Balance the Branch

Paralegal/ Project Assistant

JONES DAY - Cleveland, OH

November 1998 to June 2010

November 1998 - June 2010

- Assisted Lawyers and Legal Assistants with the preparation of depositions, maintain Client database when new production arrives from depositions with programs such as IPRO and Summation.
- Reviewing legal documents for correct form
- Conducting database searches, and error check confidential materials.
- Establishing and maintaining case records
- File documents and code into database
- Trial experience (Cite check and Track documents)

Education

Cleveland State University - Cleveland, OH

2012

B.A. in Marketing

Cuyahoga Community College - Cleveland, OH

1997

Additional Information

COMPETENCIES

- Excellent Organizational and Interpersonal Skills
- Microsoft Office Suite 2007: Excel, Word, Power point, & Outlook
- Accounting Software: Peachtree and XBRL

25¹ yrs muni tax
post 2016

Diana Fessler

Authorized to work in the US for any employer

Work Experience

Tax Assistant

City of Amherst - Amherst, OH
February 2019 to Present 2020

mark
COVID

Process and compute local tax forms
Prepare monthly and quarterly tax bills
Prepare estimate tax bills
Document new and existing businesses in area
Document exemptions for businesses
Document new owners or renters in our city
Add new owners and people to our data base and tax codes
Process payments
Filing
Answer phones

Administrative Support Specialist

Ridge Hill Memorial Park - Amherst, OH
May 2017 to September 2017

Customer Service, Prepare work orders, Take internment orders, Set up customer profiles, Prepare contracts, Record burials and Process Promotional materials.

Financial Manager

Northern Ohio Youth Orchestras - Oberlin, OH
July 2015 to January 2017

Non Profit Organization- Responsibilities include general understanding of all accounting principles as well as all financial organizational skills. Excellent communication skills, verbal and written. Building strong relationships with personnel and our customers. Accounts payable and accounts receivables. Banking deposits as well as monthly banking account reconciliations. Payroll processing done in house, as well as payroll taxes. Coordinate and do monthly and quarterly and year end taxes. Projected growth income and financial stability for monthly forecasts as well as pull reports for General Manager. Manage company's credit cards and cash receipts. Also execute and research any outstanding balances as well as customer inquiry's. Human resource functions, invoicing, fundraising campaigns and board member.

Skills Used

Quick books
Microsoft word/ Excel
Google Docs

Cage Supervisor/Coach

Horseshoe Cleveland - Cleveland, OH

April 2012 to April 2015

Played key role in the opening of the first ever Casino in Ohio- Horseshoe Cleveland- May 2012.

- Monitors daily compliance with gaming regulations and company policies as well as all state and federal regulations and governing currency transaction reporting.
- Energetic role model, who establishes self as a highly credible leader, acts in the highest levels of integrity and always in the best interest of the property and company. Resulting in being nominated for the "Chairmen's Award" 2012, 2013 also Rock Star Winner.
- Instrumental in training and monitoring new team members on their development and their understanding of their roles and update all employees on new procedures and policies.
- Strengthened relationships between departments, becoming the go to supervisor that can be counted on to get the job done in a timely manner.
- Ability to think outside the box by assessing day-to-day operations and developing and implementing revised procedures to improve the efficiency in departmental goals and operations.
- Monitors all daily cashier transactions, balancing and auditing of windows and department and casino daily as well as establish credit lines.
- Monitors the cash flow for regulatory guidelines as well as be compliant each day to meet all Title 31 expectations as well all Suspicious Activity (Sarcs) and Credit guidelines.
- Creates and executes plans and strategies to achieve out total satisfaction through anticipation of customer needs to reach our targeted total Service Goals and Mission Statements.

Collections, Debt Specialist, Loss Mitigation

Key Bank - Brooklyn, OH

March 2009 to November 2009

Dedicated Night Shift Supervisor, providing impeccable customer service and sales experience.

- Recovered and aggressively collected funds on products that were in a charged off status.
- Meet aggressive individual and departmental goals and service level agreements.
- Recovered funds on the following types of direct and indirect accounts in charge off status MTG 1st and 2nd, HELOC, KEO, HI, BLOC, PLOC, MARINE, RV, AUTO, MOBILE HOME and STUDENT LOANS.
- Adheres to all applicable guidelines including but not necessarily limited to fair Debt Collections Practices Act, Privacy, AML, Quality Control and Quality Assurance.
- Set up Work Out and Repayment Programs for customers while at the same time educating, and consulting with customers.
- Delivered financial counseling
- Reviewed accounts for Litigation and Repossession, worked on Liens, Short Sales and modifications.
- Research and Skip Traced Clients Data

Data Entry / Instant Credit

United Consumer Financial Service - Westlake, OH

March 2008 to June 2008

Data Entry.

- Answered high volume of calls per hour, averaged 45 calls. Inbound calls.
- Entered new contracts in system.
- Verified and pulled credit bureaus to approve loans. Verified credit references.
- Collections- inbound and outbound calls.

- Works well under pressure and fast paced environment.
- On monthly reviews always score 98% efficiency rating, well above the normal employee efficiency rating.
- Outstanding oral and written communication skills, able to type 45 wpm.
- Trained new employees.
- Superior Customer Service Skills

Office Manager / Secretary

Response Renovations - Cleveland, OH
May 2003 to May 2005

In charge of all Administrative procedures and personnel

- Typed estimates and contracts to insurance companies and homeowners.
- Processed insurance payments.
- Scheduled all appointments for Mgrs. and contractors.
- Accounting- accounts payable / receivable
- Payroll

Administrative Assistant, Customer Service/ Sales Accounts

Expo, Inc - Cleveland, OH
October 1994 to May 1997

Administrative Assistant

- Responsible for maintaining accounts payable and receivable as well as other bookkeeping.
- Accounting, Processed all payments.
- Collections for current payments as well as outstanding debts.
- Outstanding attention to detail, time management and resource allocation skills to coordinate multiple tasks while maintaining strong quality focus.

Client Service Rep

Key Bank - Parma, OH
June 1989 to June 1994

Responsible for managing, staffing and scheduling of Tellers.

- Trained new Tellers on policies and procedures, providing coaching to Tellers to enhance referral and operational effectiveness.
- Provided direction and guidance for branch staff on operational/regulatory procedures, and ensured compliance with operational, security, and audit procedures.
- Open new accounts.
- Loan Applications
- Supported sales goals through identification of prospects and referrals.
- Instrumental with the merger of Society and Ameritrust to Key Bank. Trained personnel in new systems and procedure.

Education

High school or equivalent

Skills

- Quickbooks (5 years)
- Payroll (10+ years)
- Administrative Assistant (10+ years)
- Outlook (10+ years)
- Marketing
- Filing
- Scheduling (10+ years)
- Excel
- Account Reconciliation
- QA/QC
- Sales Support
- Google Docs
- Tax Experience
- Office Management
- Accounts Payable
- General Ledger Reconciliation
- Auditing
- General Ledger Accounting
- Quality Control
- Financial Statement Preparation
- Journal Entries
- Bank Reconciliation
- Accounts Receivable

Additional Information

- Extensive experience implementing company policy.
- Positive, professional attitude, committed to excellence.
- Resourceful in problem solving and maximizing resources.
- Ability to change focus, used to change in the workplace.
- Able to set and achieve goals, and works well under pressure.
- Impeccable written and oral communication skills.
- Exceptional organizational skills and Multi-tasker.

18 yrs pre-2016 muni tax
MITS

ins. info

Therese R. Amick

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I would like to explore the possibility of joining the City of Bedford in the Tax Auditor position. The enclosed resume will provide you with information concerning my employment, objective, educational background, experience and proven capabilities. Based on my background and experience, I consider myself well-prepared for success within your organization.

Prior to my current role with the City of Solon Finance Department, I spent about eighteen years as a Tax Clerk processing city income tax returns for the City of Solon. My prior position required daily use of "MITS" software as well as LexisNexis. I am seeking a position that will utilize these developed skills and my broad experience with over twenty-five years in municipal employment. I believe this position is an opportunity for professional growth and one for which my qualifications are well-suited.

While I feel my resume properly represents my qualifications, I would appreciate the opportunity to discuss with you, in person, how I may most effectively fulfill your current needs.

Thank you for your attention, consideration and forthcoming reply.

Sincerely,

/s/ Therese R. Amick

Therese R. Amick

Therese R. Amick

Professional Experience

**Accounts Payable Clerk - City of Solon Finance Department, Ohio
2015-Present**

Responsibilities include: Timely preparation of accounts payable vouchers; entering of accounts payable documents with CMI software for payment, generation of accounts payable checks on a weekly basis; and other accounting duties, including positive pay, balance to ageing, processing of journal entries, and preparation of vendor reports.

**Tax Clerk-City of Solon Finance Department, Ohio
1997-2015**

18 yrs
Pre-2016

Responsibilities included: Processing city income tax returns and related documents in accordance with the City of Solon Income Tax Code; recording relevant taxpayer data and files supporting documents; assisting taxpayers with filing requirements and municipal income tax issues; and performing a variety of clerical duties relating to taxation, including the recording and processing of negotiable instruments.

**Office Assistant-Nordonia Hills Clinic, Ohio
1996-1997**

Responsibilities included: Patient check-in and check-out, payment processing, appointment scheduling, daily bank depositing, and patient chart updating and filing.

Specialized Training, Knowledge and Professional Skills

- Highly computer literate in all Microsoft Office and business applications, including CMI accounting software, Municipal Income Tax Management System (MITS), and Excel
- Audits business and individual accounts
- Manages a variety of city department accounts and the timely payment of invoices
- General knowledge of municipal income tax processes and standards including Tax Administrator's Rules and Regulations
- Passed the State of Ohio Civil Service Clerk Examination - 1996
- Experienced in handling public inquiries and communicating with residents
- Experienced in managing confidential accounts and information
- Experienced in recording daily activity from bank deposits
- Highly proficient typing skills in excess of 70 words per minute
- Excellent written, oral and interpersonal office communication skills

Education

1980 Graduate of Orange High School

City of Bedford
Attn: Finance Director

Re: Tax Auditor Position
Resume/CL - Therese Amick

Total Pages: 3

6 years tax

Lennette Pennington

Authorized to work in the US for any employer

Work Experience

Tax Expert

Intuit Turbo Tax - Cleveland, OH
December 2021 to April 2022

Helped customers who were working on their tax return with tax advice, product and software inquiries, and tax calculations. Created high quality customer interactions and experiences that instilled confidence. Utilized and leveraged government websites, professional resources, and expertise to seek out and deliver the right answer to the customer. Applied defined practices, procedures, and company policies to troubleshoot and resolve tax advice.

Tax Preparer III

JACKSON HEWITT - Bedford, OH
November 2017 to December 2021

Responsible for setting appointments, preparing tax returns, verifying the accuracy of the records that are presented by clients. Responding to client inquiries as needed, provide information for future tax planning. Mentor tax preparer team with handling escalated customer issues.

Seasonal Tax Preparer

JACKSON HEWITT - Bedford, OH
December 2016 to April 2017

Responsible for setting appointments, preparing tax returns, verifying the accuracy of the records that are presented by clients. Responding to client inquiries as needed.

Radio Dispatcher

City of Cleveland
May 2015 to November 2015

Received complaints from individuals involved in crimes and police emergencies, broadcast orders to police radio patrol units in vicinity to investigate complaints, and relayed instructions to remote units. Recorded calls broadcast and complaints received. Coordinated all police requests and relayed instructions to the radio unit concerned. Transmitted and received messages between divisions of my own agency and other law enforcement agencies.

Education

Bachelor of Science in Business Administration
SOUTHERN NEW HAMPSHIRE UNIVERSITY - Manchester, NH

July 2019 to October 2021

Associate of Applied Business in Business Management

CUYAHOGA COMMUNITY COLLEGE - Cleveland, OH

June 2013 to May 2015

Skills

- SKILLS & ABILITIES Profler Tax Preparation Program -Jackson Hewitt Tax Services, Microsoft Office 2019: Word, Excel, PowerPoint, Outlook and Publisher, Portal (Internal Internet)
- Accounts Payable
- Office Management
- Payroll
- Phone Etiquette
- Microsoft Office
- Customer service
- Cash handling
- Financial services
- Accounts Receivable
- Microsoft Windows
- Accounting
- Communication skills

Certifications and Licenses

Notary Public

January 2021 to January 2026

Assessments

Customer Focus & Orientation — Highly Proficient

April 2020

Responding to customer situations with sensitivity

Full results: Highly Proficient

Accounting: Basic Principles — Familiar

April 2020

Preparing financial records according to federal policies

Full results: Familiar

English Communication Skills: Typing — Familiar

April 2020

Transcribing text using a standard keyboard

Full results: Familiar

Project Management Skills: Time Management — Proficient

April 2020

Prioritizing and allocating time to effectively achieve project deliverables

Full results: Proficient

Project Management Skills: Budgeting — Proficient

April 2020

Managing project budgets by appropriately allocating and monitoring financial resources.

Full results: Proficient

Call Center Customer Service — Highly Proficient

May 2020

Applying customer service skills in a call center setting.

Full results: Highly Proficient

Customer Focus & Orientation — Highly Proficient

April 2020

Responding to customer situations with sensitivity

Full results: Highly Proficient

Indeed Assessments provides skills tests that are not indicative of a license or certification, or continued development in any professional field.

Noshow

2 yrs muhi tax
post 2016

Jamia Powell

Authorized to work in the US for any employer

Work Experience

Collections Specialist

Regional Income Tax Agency - Brecksville, OH
July 2019 to Present

establishing payment plans, explaining tax balance calculations, negotiating settlements, skip tracing and processing payments by credit card and/or check. The position includes heavy inbound/outbound call volume and requires excellent customer service skills in a fast paced environment.

Collection Specialist

McCarthy, Burgess & Wolff, Inc - Bedford, OH
December 2017 to July 2019

Utilize various skip tracing techniques and collection strategies to locate parties. Prepare notifications to secure payment; explain penalties, interest, and deadlines. Ability to negotiate while maintaining a manner which shows sensitivity, tact, and professionalism. Ability to multi-task by speaking with customers and typing simultaneously.

Direct Support Professional

KOINONIA HOMES - Independence, OH
July 2015 to December 2016

Scheduled DSP assignments, entering data and record assignments electronically. Working directly with individuals with physical disabilities and/or intellectual disabilities with the aim of assisting the individual to become integrated into his/her community and environment.
Medication Administration, vital signs, patient monitoring, assist with personal care.

Education

High School Diploma

Remington College - Bedford, OH
June 2015 to August 2016

Lakewood City Academy
2007 to 2011

32 years tax

Cover letter

To Whom it may concern:

I am currently looking for a full time position using my tax skills. After reading thru the job posting, I am very interested in applying for the position. It aligns with my skill level and my own career goals.

I look forward to discussing my qualifications.

Thank you

Michelle A. Salvaggio

Michelle A. Salvaggio, CPA

CERTIFICATION

Certified Public Accountant, Ohio Board of Accountancy

EDUCATION

Marietta College

Bachelor of Arts in Accounting

PROFESSIONAL EXPERIENCE

Weidrick Livesay & Company

November 2019-August 2022

DKC-Warfield & Company

January 2018-November 2019

D'Amore Tatman Group – Beachwood, OH

January 2017-December 2018

BDO USA (formerly SS&G Inc.) – Cleveland, OH

February, 1985-December 2017

Tax Manager

- Review and prepare corporate, partnership, individual and trust returns including required federal, state, and local tax forms.
- Correspondence with various agencies in regard to tax notices.
- Representation of client for IRS, workers compensation and state unemployment audits,
- Specialization in accounting for the restaurant and hospitality industry.
- Review and Prepare payroll tax returns-federal state and local.
- Review and prepare write up-work and compilation financial statements.
- Mentoring and training new associates.
- Maintain client relations in various types of industries

32

SOFTWARE PROFICIENCIES

- Lacerte Tax
- Ultra Tax
- GoSystems,
- GoFileRoom,
- CCH ProSystem fx Tax
- CCH ProSystem fx Engagement
- Fixed Assets CS (DSW)
- Quickbooks
- CSA (Creative Solutions)
- BNA Income Tax Planner
- Adobe
- Document Manager

ACTIVITIES

- Aurora Ultimate Boosters, *Treasurer*

5 years muni tax
pre 2016

Manuel Clay

Assistant Manager - Petco

To obtain knowledge to be able to grow within the company, as well as providing skills for the growth of the company.

Work Experience

Underwriting Assistant

AmTrust Financial - Cleveland, OH
January 2022 to Present

I am supporting 2 financial institution underwriters and 1 bank underwriter. I am responsible for processing bank submissions, doing auto renewals, sending out bank solicitations and renewal solicitations every month, and any other duties to help out the underwriters.

Assistant Manager

Petco
December 2012 to March 2022

In charge of the front end of the store. Hiring and training new employees. Oversee all sales associates, cashiers, dog trainers and aquatic/reptile specialists. In charge of yearly reviews and pay raises. Handle all customer service calls and complaints. Pull weekly and monthly reports outlining sales and customer service. Responsible for daily and weekly payroll for all employees of the store. Organize all paperwork and reports for the office. Assist where needed for the General Manager.

Processor

AmTrust Financial - Cleveland, OH
April 2017 to January 2022

Made endorsement changes in Workers Comp insurance policies such as: coverage changes, premiums, cancellations and nonrenewable. Also did any office projects assigned by the supervisor

Merchandising Project Team/Sales Associate/Reptile Specialist

August 2009 to December 2012

Was given four different store locations to do merchandising projects. Read and completed new planograms, reset old planograms, and any other duties given by the General Manager of each location. As a sales associate, my duties were cashiering, customer service, stocking, main-raised animal cages and animal care. Knowledge in animal nutrition, dogs, cats, fish, birds and reptiles. Gave advice on those subjects.

Custodian

City of Maple Heights

May 2008 to March 2009

Made sure the buildings of the Police Department and Jail were cleaned on a daily basis. Did light maintenance work, and maintained the outside of the buildings as well. Also cleaned City Hall and Senior Center when needed.

Tax Auditor

City of Lakewood

December 2005 to March 2008

Provided assistance to the staff, taxpayers and accountants on the questions of tax regulations and liability. Examined tax returns to determine the existence of fraud or problems of delinquency. Selected appropriate remedies, such as setting up payment plans. Prepared city income tax returns for taxpayers. Reviewed and approved tax refunds. Closed down and balanced counters, put money and counter batches in safe. Answered phones and responded to correspondence.

Auditor I

Regional Income Tax Agency

June 2000 to December 2005

Received and answered all calls regarding city income tax questions. Prepared city income tax returns for taxpayers. Responded to correspondence by phone or mail. Received and posted tax payments on 09 forms to be deposited into the bank. Editing of tax forms and any clerical duties assigned.

Chief Financial Officer

Peace Be Still

February 2000 to October 2004

In charge of monies taken in, receipts, and all finances for non-profit organization's charity events. Also collects dues from the board members, and oversees preparation of tax returns.

Additional

Information: I am a very fast learner and can learn any computer program. I can do 10- key calculator by touch and am a skilled typist, typing 60 - 75 wpm. I also have great organizational skills.

Data Entry Operator

February 2000 to June 2000

Accurately inputted filed tax forms and W-2 forms into the system.

Education

Dyke College - Cleveland, OH

Skills

- Data Entry
- Planograms
- 10 Key Data Entry
- Animal Care
- Custodial Experience
- Workers' Compensation
- Tax Experience
- Merchandising
- Management

Chenoa T. Valpando

2 years tax

Professional Profile

Seeking employment that will allow me to gain experience in a growth-oriented organization. A team player with proven leadership qualities, demonstrating exceptional customer service skills. Highly organized individual dedicated to the advancement of the organization and personal career goals. Interacts well with executive management, stakeholders and peers. Skilled in office automation duties include the creation, editing and publishing of documents. Proficient at accounts receivables, distribution and transportation management, as well as the lead administrative liaison. Confident in the handling of situations of a critical and sensitive nature.

Key Strengths

- Proficient in Microsoft Office Suites
- Talented scheduler and organizer
- Excellent customer service skills
- Exceptional communication and organization skills
- Keen judgement in critical thinking situations
- Benefit Assurance Specialist
- Strong interpersonal skills

Education

Phlebotomy Technician
Larock Academy 2018
University of Phoenix David Myers University (2003) Major: Criminal Justice
Major: Criminal Justice

Employment

**State of Ohio Department Job and Family Service, Ohio Insurance
Unemployment Operations - Adjudicator 2020 to Present**

State representative for Ohio Unemployment Insurance investigations.
Working in a fast paced environment identifying and investigating backlogged claims. Effective in investigating unpaid claims, researching benefit settlements,

contacting claimants and employers, dispute management, time management and disbursement of insurance benefits. Actively participates in all ongoing departmental training.

H&R Block Tax Advisors - Block Advisor Tax Specialist 2020-Present

Prepares taxes for high bracket clients. Advises on new tax laws and potential benefits to clients. Adheres to all Federal and State tax codes. Ensures that returns are filed in a timely manner to all tax authorities. Strong knowledge of accounting laws and procedures. Participates in all ongoing training as regulated by companies and governments. Prepares forms for corporation and business taxes. Excellent technical knowledge and analytical skills. Manages clients efficiently. Gathers information and communicate options for clients' best practices.

H&R Block - Corporate Business Office Manager 2011-2020

Tax professional Managing office located in Mayfield Heights, Ohio. Coordinating staff schedules and building management. Responsible for summary reporting of client submission for Federal and State tax purposes. Reporting to the Regional Director on all anomalies associated with the preparation of taxes from staff. Accounts receivable and accounts payable for all vendor's and B2B businesses. Administrator **Coordinator:** Initial liaison for client's tax services. I serve as the coordinator responsible for tax preparers and clients requests. I review and conduct quality assurance of determining factors submitted by office staff. I monitor, manage, process all requests or record inquiries. I successfully scheduled meetings, appointments and interviews. Proofread, revised and typed documents and appropriately routed correspondence. Interacts with executive staff to develop and maintain tracking systems for procurement and personnel requests. Assisted executive staff at the corporate office in maintaining employee and client records and associated documents and files. Prepared routine correspondence from notes, oral instructions, letters on file, or standard operating procedures. Processed routine forms and maintain and update various tax files, organization files, and other office documents. Serves as front desk receptionist, receiving clients and incoming trainees. Assists executive staff with the submission of final year-end reports and close-out files.

Ohio Department of Transportation 2016- 2017 Delivery Worker / Inventory Control

As a State of Ohio delivery worker I was charged with driving a state vehicle to transport and pick up of various materials (i.e., supplies, payroll, laboratory samples, parts and machinery) on scheduled local and statewide routes from the District between Central offices to County garages. Traveling to Columbus and southern offices to pick up vehicles and/or equipment and addressing customers' concerns. Inventory control for garage stockrooms, sorting and distributing parts, supplies, while maintaining records and databases as necessary. Checks invoices for all cargo merchandise and receivables. Works as an intermediary to obtain materials for mechanics, timekeepers and other personnel. Performed administrative duties as departmental needs demanded.

Berea Children's Home and Family Services 2010-1017 Youth Counselor/ Agency Trainer

Youth Counselor in dorms with young adults monitoring activities, group sessions and documenting case management. Worked with youth on literacy levels, crafting, skills building and monitored dorm maintenance. Leading varied group sessions with substance abusing youth, youth for success and continuing education. Provided documentation to

Case Managers, Social Workers and supervisors. Trained new incoming and seasoned staff with necessary skills in CPR/ AED certifications licenced throught American Red Cross.

Abderzak Charfaoui, CPA, Inactive

3.5 years tax

Objective: Seeking the Tax Auditor position at the city of Bedford, Ohio utilizing skills attained through relevant education as well as experience gained on the job training working for a CPA firm and tutoring various accounting subjects at Cleveland State University.

Education:

Cleveland State University, Cleveland OH:
Master of Accountancy Degree in Financial Accounting and Reporting /Audit: Grad Summer 2013.

- ❖ Maintained a 3.94 GPA while employed time and a half
- ❖ Earned the CPA designation on 04/11/2018. (Ohio CPA License # 54440, Inactive)
- ❖ Relevant courses: Advanced Accounting, Intermediate Accounting, Attest Function (external auditing), Internal Auditing, Accounting Systems, Individual & Business Taxation, Cost Accounting, Accounting policy... among others

Ferhat Abbas University, Algeria:
Bachelor of Business Administration;
Major in Finance. Grad June 2005

- ❖ Credentials evaluated by Educational Credentials Evaluators (ECE)
- ❖ Courses include Financial Management, Principles of Management, Financial Mathematics, Financial Theory, Budget Management, Monetary Theory and Investment Choices...etc.

Career History:

Walton & Stewart CPAs Mentor, OH 11/15/2015 to 02/2019
Staff Accountant

- ❖ Prepared tax returns.
- ❖ Prepared compilations and performed tax write up work.
- ❖ Maintained the books of several clients.
- ❖ Processed payroll for several Clients

Cleveland State University Cleveland, Ohio 08/27/2011 through 12/13/2012
Accounting Tutor (Part-Time)

- ❖ Helped my fellow students solve accounting problems from different subjects increasing the turnout of students visiting the tutoring center to a record high.
- ❖ Assisted my colleague students in understanding the accounting theory.

H&R Block, Inc. Lakewood, Ohio 12/05/2009 through 04/15/2010
Tax Associate (Part-Time)

- ❖ Prepared tax returns for individuals
- ❖ Assisted in filing of paperwork and maintenance of the office

- ❖ Provided excellent customer service in a professional manner

Benhamouda Yahia Audits Algiers, Algeria 09/12/2006 through 04/20/2007
Accounting Associate (Full-Time)

- ❖ Kept the journals as well as the general and subsidiary ledgers up-to-date.
- ❖ Assisted in end-of-period closing operations.

Independent Contractor Cleveland, OH 05/2019 to present

- ❖ Provided rides and deliveries to customers through a variety of platforms while looking for my next accounting career opportunity.

Propark America Cleveland, OH 07/2007 to 05/2019
Parking Attendant

- ❖ Processed cash register transactions accurately.
- ❖ Participated in events.
- ❖ Answered patron's questions courteously.

Honors, Activities

- ❖ Obtained membership of the Beta Gamma Sigma Student Honors Organization.
- ❖ Student member of Beta Alpha Psi (while taking master's classes at Cleveland State University.)
- ❖ Secured a scholarship awarded by the Accountancy Board of Ohio among others.

Computer/Other skills

- ❖ Obtained a Data Processing Operator Certificate (Microsoft Word, Excel, PowerPoint, and Internet.)
- ❖ Speak and/or write other languages: French; Arabic and Berber (native language).
- ❖ Proficient at several accounting software applications including QuickBooks, Accounting CS among others.

Jennifer Howland

From: Abderzak Charfaoui
Sent: Sunday, August 14, 2022 2:55 PM
To: Jennifer Howland
Subject: Tax Auditor Position
Attachments: Abderzak Charfaoui's Resume - Tax Auditor.docx

Dear Ms. Jennifer Howland;

My name is Abderzak Charfaoui, a city of Bedford, Ohio resident. I would like to apply for the Tax Auditor position posted on the city's careers website. A copy of my resume is attached.

With respect to my career history, I have worked for a small CPA firm in Mentor, Ohio where I lightly worked on some clients' city tax returns, and I did the same when I worked for H&R Block a few years ago. I do not want to overstate my experience preparing municipal tax returns, so I will rather promise - should I be honored to be selected for this position.- to give this career opportunity my undivided attention and willingness to learn and perform at or above your expectations.

Concerning my educational background, I have earned a Master's of Accountancy degree from Cleveland State University, with a major in Audit and Financial Reporting. I also earned the Ohio CPA designation back in 2018 (Inactive Status due to some personal circumstances). Beyond my experience and educational background, I would rather emphasize my strong desire and willingness to re-launch my accounting career should I be fortunate enough to be selected to serve your office as well as the Bedford, Ohio community.

Waiting to hear back from you, Please receive my sincere greetings.
Respectfully;
Abderzak Charfaoui

28 years tax

Deborah Hinds, E.A.

Objective To obtain position in a good company using experience and skills in accounting.

Experience

Cash Application Processor
Oct 2021 – Present, Beacon Hill Temporary @ Olympic Steel, Beford Heights, Ohio

Responsible for keying large incoming payments. Follow up on field Requests.

Master Tax Preparer
Dec 1994 – Present, H&R Block, Willowick, Ohio

Responsible for conducting complete tax interviews and preparing returns so clients pay the least possible tax, as prescribed by the tax law. Enters tax returns into the computer to be accepted for electronic transmission to the IRS. Successfully implements Block's client service programs, as well as adhering to office and reporting systems procedures.

Cash Application Processor
July 2013 – Jan 2021, Sherwin Williams, Cleveland, Ohio

A strong commitment to timely and accurately applying customer cash payments. Follow up on all field requests and customer requests via e-mail and or telephone. Inquire and receive accurate remittance details from customers, stores and credit offices as needed. Properly identify and document the collectible payments

Merchandise Payables Associate
Sept 2010 – March 2013, Dots LLC, Glen Willow, Ohio

Match receiving documents with invoices, enters invoices into computer software program. Troubleshoot billing errors and shipping discrepancies. Respond to vendor information requests. Post to journal and run daily Reports.

Tax Instructor
July 1997 – Dec 2001 H&R Block, Willoughby, Ohio

Used good communication skills and thorough tax knowledge to provide Instruction to students.

Education Lakeland Community College, Kirtland, Ohio
Graduated 2007
Associates of Applied Business degree in Accounting
4.0 GPA

Excel, Microsoft Word

5 years tax

Jennifer Allie

Accountant that has experience in Quickbooks, forensics and taxes. Would like a long-term accountant position with a stable company. I have higher than an Associates degree, that you require. Indeed forced me to enter this sentence.

Willing to relocate: Anywhere

Authorized to work in the US for any employer.

Work Experience

Intuit- Quickbooks Bookkeeper/ Turbo Tax Tax Expert

Intuit - Remote

December 2020 to Present

Quickbooks clean up legacy project bookkeeper

Tax Preparer

Seasonal FT - Stow, OH

October 2017 to Present

Preparation of simple and complex tax returns

- Manage office duties

Education

Master's in Accounting

Southern New Hampshire University

April 2019 to May 2021

Bachelors of Science in Economics

Strayer University - Akron, OH

April 2005 to May 2010

Skills

- Quickbooks Pro Advisor (1 year)
- Quickbooks (2 years)
- Accounting
- Microsoft Office (5 years)
- Receptionist
- Customer Service
- Microsoft Word

- Excel (1 year)
- communication skills
- Tax Experience (5 years)
- General ledger reconciliation
- Financial Report Writing
- Bank Reconciliation
- Accounts Receivable
- Account Reconciliation
- Accounts Payable
- Journal Entries
- Office Management
- Bookkeeping
- GAAP
- Financial analysis
- Management Accounting: Basic Principles
- Proficient Accounting Skills: Bookkeeping
- Highly Proficient April 2020 Calculating and determining the accuracy of financial data Full results: Highly Proficient Principles of Accounting
- Proficient February 2020 Preparing financial records according to federal policies Full results: Proficient Nursing Skills: Clinical Judgment
- Proficient April 2020 Assessing a patient's condition and implementing the appropriate medical intervention. Full results: Proficient Teaching Skills: Elementary Lesson Planning
- Proficient May 2020 Developing lesson plans for elementary-level classrooms that promote learning Full results: Proficient Indeed Assessments provides skills tests that are not indicative of a license or certification, or continued development in any professional field.

Certifications and Licenses

Enrolled Agent

Driver's License

Assessments

Attention to detail — Familiar

March 2020

Identifying differences in materials, following instructions, and detecting details among distracting information.

Full results: Familiar

Principles of accounting — Proficient

November 2021

Preparing financial records according to federal policies

Full results: Proficient

Managing accounts in QuickBooks — Proficient

November 2021

Using QuickBooks software to manage business financials

Full results: Proficient

Accounting skills: Bookkeeping — Highly Proficient

April 2020

Calculating and determining the accuracy of financial data

Full results: Highly Proficient

Clinical judgment — Proficient

April 2020

Assessing a patient's condition and implementing the appropriate medical intervention.

Full results: Proficient

Elementary school lesson planning — Proficient

May 2020

Developing lesson plans for elementary-level classrooms that promote learning

Full results: Proficient

Indeed Assessments provides skills tests that are not indicative of a license or certification, or continued development in any professional field.

6 mo. tax exp.

Gary Williams

called about
application status
8/19/22

To obtain a position that provides me with an opportunity to utilize my strong interpersonal, time management, and organizational skills to improve the efficiency and quality of services within a governmental setting.

Willing to relocate to: Cleveland, OH - Akron, OH

Work Experience

Tax Preparer/Bookkeeping

Strah & Associates, CPA - Copley, OH
March 2022 to Present

3/22-PRESENT

- Data entry of client tax information, into Drake software, for completion of individual (Form 1040) and business (Forms 1065, 1120 and 1120-S) tax return preparation and reconciliations.
- Entered and reconciled bank transactions, into QuickBooks, for small business clients.

Intervention Specialist/Intake & Diversion Officer

CUYAHOGA COUNTY JUVENILE COURT - Cleveland, OH
February 1993 to July 2020

12/14-7/20

- Coordinated services for pre-adjudicated youth to reduce recidivism and minimize involvement in the juvenile justice system; Reviewed police reports and determined appropriate initial case track. Assessed and provided intervention for youth and interviewed families to determine risk level, referred youth/families to appropriate social service/agency, and completed statistical reports to identify trends in juvenile behaviors.

Research Associate

July 2003 to December 2014

- Audited felony delinquency cases by accessing and reading the youth's case complaint(s) and fact sheet. Utilized and possessed a thorough knowledge of the Ohio Revised Code, the Juvenile Court's Case Management System and operations which required a high level of organization, detail orientation, and strong computer literacy including all MS Office products.

Fiscal Review Officer

May 1997 to July 2003

- Conducted interviews with parents to obtain and analyze their finances in order to establish a support order for the duration their child was in Juvenile Court custody. Prepared and submitted reports regarding collection and expenditure activities. Duties included accounting, cashiering, and supervision.

Assistant Bailiff for Judge Betty Willis Ruben

February 1993 to May 1997

- Set court docket, prepared daily legal files/final disposition paperwork on cases, and managed overall court operations. Demonstrated ability to multi-task simultaneously in a fast-paced environment.

Education

BACHELOR OF ARTS in SOCIAL SERVICES/CRIMINAL JUSTICE

CLEVELAND STATE UNIVERSITY

1991

Skills

- Strong interpersonal skills
- Multitasking and efficient
- Effective research and information processing skills
- Excellent communication skills and detail oriented
- Proven organizational abilities
- Possesses a positive reputation and track record within public safety guidelines
- Reliable
- dependable
- committed
- Tax Experience
- QuickBooks
- Bookkeeping

Penny J. Jarrell

Work experience

Ohio Police Juvenile Officers Association **May, 2018 – Current**

Executive Secretary

Bedford Police Department **January, 2002 - Current**

Juvenile Diversion Coordinator/Secretary

- ◇ Interview juveniles and their parents who are eligible.
- ◇ Attend conferences with a volunteer magistrate and the juveniles their parents.
- ◇ Monitor participant's progress and ensure they complete their sanctions.
- ◇ Prepare monthly reports for the Cuyahoga County Juvenile Court.
- ◇ Clerical support for the Chief of Police
- ◇ Clerical support for the Detective Bureau
- ◇ Records clerk
- ◇ Apply for local, state and federal grants for the police department and SEALE

Emery Electric, Inc., Twinsburg, Ohio

Office Manager **August 1999 – February 2001**

- ◇ Accounts receivable and accounts payable.
- ◇ Payroll, payroll reports and union reports.
- ◇ Answering phones, processing mail, and purchase orders.
- ◇ Communications directly with contractors and suppliers.
- ◇ Prepared bids for estimator.

National City Bank, Bedford, Ohio

Customer Service Representative **June, 1999- August 1999**

National City Bank, Cleveland, Ohio

Stock Transfer Administrative Assistant **1993 – June 1999**

- ◇ Assist account officer in all duties of administering stock transfer agency accounts.
- ◇ Maintain direct contact with corporate executives, their investors, and legal counsel regarding services and information; solve customer/investor problems requiring decision-making skills and sound judgment with minimal input from account officer.
- ◇ Assist account officer in planning and implementation of annual shareholder meetings, stock option exercises, public offerings, dividend reinvestments plans, employee stock purchase plans, restricted stock and stock option plans, stock splits, and merger and reorganization activity for all corporate trust clients.

Research Specialist

1988 - 1992

- ◇ Reconciled approximately 350 Corporate Trust dividend and interest check disbursement accounts.
- ◇ Implemented procedures for Stock Transfer to identify and minimize outages.
- ◇ Primary back-up for Control Assistant
 - Audited all stock transfer activity
 - Maintained outstanding share balances for all Corporate Trust accounts

Customer Service Representative

1985 - 1987

- ◇ Responded to shareholder inquiries both telephonic and written regarding a variety of questions such as replacement of lost dividend checks and stock certificates, legal transfers, transfers involving decedents, minors and gifts.

Dividend Clerk

1984 - 1985

- ◇ Responsible for setting up dividend payments for Corporate Trust clients.
- ◇ Reconciled and balanced all dividend and interest payments for Corporate Trust clients.
- ◇ Insured that checks were accurate and mailed on time.
- ◇ Balanced and reported federal and non-resident alien tax withholding to the Internal Revenue Service and made appropriate deposits to U.S. Treasury Tax and Loan Account.

Education

Major: Bachelor of Science in Business Administration

Cuyahoga Community College

Associate of Applied Business

December 2008

Baldwin-Wallace College, Berea, Ohio

1998 - 2004

Cleveland State University, Cleveland, Ohio

1989-1991

Professional Certification

Notary Public - State of Ohio



Position Description



Juvenile Community Diversion Program Specialist / Secretarial Assistant

General Statement of Duties:

This position requires the confidentiality of work product and other information that is revealed and accessible during accomplishment of the required duties.

Under the general supervision of the Chief of Police and the Supervisor in charge of the Investigative Bureau, through partial grant funding of the Cuyahoga Juvenile Court, coordinates the Juvenile Community Diversion Program. Reviews and prepare juvenile arrest information for presentation to juvenile court, monitors repeat juvenile offenders, investigates and recommends parental/guardian sanctions for failure to supervise minor, and coordinates with the detective bureau and juvenile officer on all juvenile offenses within the city. Is a liaison between the police department, the juvenile court, and other departments requesting juvenile information. Work in cooperation with the Bedford School System and the School Resource Officers.

Explores, investigates and applies for local, state and federal grants that would benefit the police department and the community.

Prepares and submits reports for Grants.

Prepares and submits necessary reports.

Monitors and maintains updates for the Bedford Police Departments WEB page, Facebook, and other online tools of the Bedford Police Department.

In the absence of the Chief or the Detective Bureau's secretary, performs the necessary secretarial duties.

In the absence of the Records Clerk, performs the necessary duties.

Other duties as directed by the Chief of Police.

Also assists the SEALE Narcotics Bureau with administrative duties. See "Investigative Assistant to SEALE Narcotics" job description.

Distinguishing Features of the Class: This position requires a high degree of confidentiality, dependability, initiative, independent judgment, and scheduling flexibility.

Examples of Work: (Illustrative Only)

- Reviews confidential juvenile arrest information
- Completes Juvenile Fact sheets
- Updates CAD and Incident Reports

Position Description

Juvenile Community Diversion Program Specialist / Secretarial Assistant

- Creates and updates Jail Bookings
- Coordinates, schedules and attends community diversion hearings
- Interview parents/guardians
- Investigates backgrounds of juvenile conduct and behavior
- Coordinates scheduling of community diversion details
- Cooperates and Coordinates with Bedford Schools on youth activities
- Prepares annual reports
- Clerical support for the Chief of Police
- Clerical support for the Detective Bureau
- Fill in when Records Clerk is off

Required Knowledge, Skills, and Abilities:

Effectively and clearly speak, write and understand the English language.

Must be able to pass all tests for certifications and recertification (LEADS, CCH)

The ability to work effectively with supervisors, administrators and managers.

Knowledge of modern office procedures and practices.

The ability to effectively communicate verbal and non-verbal with people.

The ability to effectively work with young children, young adults, parents, and guardians.

Ability to quickly learn and apply new job requirements.

Excellent ability to type and operate a personal computer with word processing software using Microsoft and other work products.

Ability to use and understand email, fax and duplication machine operations.

Ability to learn and apply techniques and requirements to maintain WEB pages and accounts.

The ability to understand and carry out complex oral and written directions.

The ability to handle routine administrative details including composition of letters and memoranda.

Ability to maintain confidentiality of sensitive records and materials.

Ability to work cooperatively with others, meet the public directly or by phone, and to provide information completely and efficiently, employing tact, courtesy, composure under pressure, and use good judgment.

Must have legal and unsanctioned access to work computers and law enforcement databases and information including but not limited to LEADS, NCIC, and OHLEG. Must have regular predictable attendance. Felony convictions are prohibited.

Position Description

Juvenile Community Diversion Program Specialist / Secretarial Assistant

Education: Graduation from high school, or the equivalent, preferably supplemented by associate degree from a college or university.

Pre-employment requirements: Successfully pass background investigation, Polygraph, and/or CVSA (voice stress), and/or psychological examination, and medical screening.