

Kimberly Wells

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EDUCATION

Bachelors of Science in Accounting

May 2018

Minor in Financial Planning

The College of Saint Rose, Albany, New York (GPA: 3.9)

Study Abroad Spring Semester 2017

Regents University London, United Kingdom

Member of SU Financial Investment Association

RELEVANT COURSEWORK

- Financial and Managerial Accounting, Intermediate Accounting I & II & III
- Retirement and Benefits Planning, Insurance Planning
- Taxation and H&R Block Income Tax Course

PROFESSIONAL EXPERIENCE

Accounting Intern, GP Fund Solutions, Latham, NY

June 2016—November 2016

- Assisted in internal audit procedures such as recalculations and footing demonstrating attention to detail
- Prepared investor requests for various funds with the ability to multitask and manage time effectively
- Independently managed quantitative data to tie-out bank statements to related statements
- Assisted with the financial reporting process through special projects when requested demonstrating flexibility

Accounting Intern, Kushi & Myers, Pittsfield, MA

June 2016—August 2016

- Entered journal entries into QuickBooks for various clients with accuracy
- Prepared monthly bank reconciliations in a timely manner
- Calculated financial ratios for local businesses
- Managed the initial input for complex tax returns prior to completion

Tax Professional, H&R Block, Albany, NY

December 2014—April 2016

- Prepared simple to complex income tax returns for individuals (Seasonal)
- Obtained a personal client base through building customer relationships
- Computed taxes owed by following tax code procedures
- Uncovered potential deductions and credits for those individuals entitled
- Addressed and identified potential liabilities based on specific client's situation and eligibility
- Recommended additional products and services through upselling activity
- Prepared tax returns using electronic filing software

Volunteer Income Tax Assistant, NYS OTDA, Albany, NY

January 2015—April 2015

- Certified with the IRS and NYS to prepare and file taxes (Seasonal)
- Assisted skilled preparers in filing federal and state income taxes
- Scheduled appointments for qualifying individuals on a face to face where communication and interpersonal skills were of importance

COMPUTER SKILLS

Microsoft Excel, Word, and PowerPoint, QuickBooks, various tax software, and adept typist.