Rosalind Ekwueme

Tax Preparer, Enrolled Agent

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SUMMARY

Enrolled Agent with 6 filing seasons preparing individual and small business returns. Prepares about 420 returns a season in Drake Tax, including Schedule C, E and rental property returns, with an e-file rejection rate under 1%. Keeps a 91% client return rate and handles IRS notices and amended returns year-round.

EXPERIENCE

Tax Preparer — Bayshore Tax & Accounting

Tampa, FL · Jan 2023 – Present

- Prepare about 420 federal and state returns a season in Drake Tax, including 110 Schedule C and 60 rental property returns, with under 1% e-file rejections.
- Resolved 75 IRS notices in 2025, from CP2000 underreporting letters to missing-payment notices, recovering or abating about $64K for clients.
- Built a document checklist sent to clients each January, cutting returns held for missing forms from 30% to 12%.
- Review returns from 3 seasonal preparers during peak weeks, catching an average of 6 errors a week before filing.
- Kept 91% of an inherited 300-client book over 2 seasons through year-round check-ins on estimated payments.

Seasonal Tax Associate — Gulfline Tax Service

Clearwater, FL · Jan 2020 – Apr 2022

- Prepared about 300 individual returns a season, mostly W-2, EITC and education credit filings, in ProSeries.
- Kept a review correction rate of 3% across 3 seasons, below the office average of 8%.
- Interviewed walk-in clients in English and Spanish, about 40% of the office's appointments in 2022.
- Prepared 45 amended returns for clients who had missed credits, recovering an average refund of $1,150 each.

SKILLS

Returns: Form 1040, Schedules A, B, C, D, E and SE, EITC, education credits, state returns, Form 1040-X

Software: Drake Tax, ProSeries, QuickBooks Online, Excel, SmartVault portal

Compliance: IRS notice response, due diligence (Form 8867), Circular 230, client data security

Client service: Client interviews, bilingual English and Spanish, estimated payment planning

CERTIFICATIONS

Enrolled Agent (IRS), 2023

Active PTIN

EDUCATION

B.S. Accounting, University of South Florida, 2019

Fictional example by FindAJobAI: the person, employers and numbers are invented.