

JUAN OJEDA JR.

[linkedin.com/in/juanojedajr/](https://www.linkedin.com/in/juanojedajr/)

(213) 858-1209 | juan.ojeda@snhu.edu

TAX ADVISORY PROFESSIONAL

Junior student pursuing a B.S. Degree in Accounting with strong tax preparation expertise and a commitment to delivering accurate financial services. Proficient in Microsoft Office, QuickBooks Online, Salesforce CRM, Canopy CRM, and Crosslink Tax Software. Detail-oriented with a comprehensive understanding of Tax Law and IRS communication. Seeking an entry-level accounting position to apply knowledge and experience while contributing to organizational success.

EDUCATION

Southern New Hampshire University: Manchester, NH | Feb 23 exp completion Mar 25
Bachelor of Science- Accounting
(concentration in Forensic Accounting and Fraud Examination)

Academic Honors

4.0 GPA - President's List | Sigma Alpha Pi | The National Society of Leadership and Success (The NSLS)

Extracurricular Professional Licenses & Certifications

California Registered Tax Professional (CTEC) | IRS PTIN | NSLS - (FOL101-1 & 101-2)
Foundations of Leadership Certification (ADV 201) Advanced Leadership Certification & (EXEC 301 & 302) Executive Leadership Certification (In Progress)

PROFESSIONAL EXPERIENCE

Tax Advisor, YourTaxPro247

Oct 2018 – Present

- Prepared individual and business tax returns, including 1040, 1120, 1120s, and 1041 forms, Tax Resolution Advisory, Offer-in-compromises.
- Analyzed Profit & Loss reporting data using QuickBooks Online to ensure accuracy and compliance.
- Advised business clients on Entity Formation and provided Registered Agent servicing.
- Resolved client issues by proactively communicating with IRS personnel and staying updated on tax laws.
- Leveraged industry knowledge to optimize clients' returns through due diligence.

Compliance Manager & Tax Practitioner, TaxNerd, Inc.

Oct 2018 – Oct 2022

- Developed compliance programs and reviewed company policies to ensure legal and ethical operations.
- Conducted interviews, performance reviews, and practice reviews for contractual tax practitioners.
- Maintained a 93% retention rate through continuous education and training of tax practitioners.
- Prepared complex tax filings for individuals and businesses, including 1040, 1120, 1120s, and 1041 forms, Tax Resolution Advisory, Offer-in-compromises.
- Utilized QuickBooks Online for Profit & Loss reporting and data analysis.
- Consulted clients on pre-tax planning, financial statements, and corporate tax returns.

LEADERSHIP

Retail Store Manager (Multi Unit), Verizon Wireless

Aug 2017 – Aug 2018

- Multi-Unit Store Manager (Retail Sales/Operations) for A Wireless (now Victra Wireless), lead 2 locations, 15 Direct reports, 2 Store Managers, 2 ASM's, 2 Leads.

Multi-Unit Manager, Comcast Corporation

Feb 2014 – Aug 2017

- Multi-Unit Store Leader, People Leader, Sales Leader, Mentor, Coach, Recruiter, H.R Partner, leadership frontline developer for multiple legacy and newly developed Xfinity Retail Store Locations (25 million in sales) in the greater San Francisco Bay Area & Sacramento Area.
- Drove Sales & Operations Excellence, overachieved expected metrics & KPI's, lead a sales/operations team of 30-40+ sales professionals including 4 managers.

Sales & Training Manager, Guitar Center

Jan 2012 – Feb 2014

- Operated, lead, and drove Sales for the San Marcos location that generated revenue at 8-12 million a year with a staff size of 40+ sales associates.
- Trained, Mentored and Promoted 5 front-line associates to leadership roles within the company in 18-months. Assisted with store opening and closing, customer relations and inventory activities.

RELEVANT SKILLS

Software: Quick Books Online | Microsoft Office | Salesforce | Crosslink | Canopy