

Bruce Olivarri, CPA

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EXPERIENCE

Senior Tax Consultant, G. McKittrick Moses, Inc., Columbus, Ohio **Sept. Year – June Yr**

G. McKittrick Moses, Inc. is a \$1+ billion publicly-traded company that administers a wide array of investment vehicles, as well as asset management advisory services (including retirement plan advice for individuals) and discount brokerage. Other services include corporate retirement plan management and transfer agent and shareholder services.

Reason for Leaving: I liked the additional tax consulting experience at G. McKittrick Moses, but discovered that I want to return to public accounting for a balance of compliance and consulting. Also, at G. McKittrick Moses, I was serving one mutual fund company, in a relatively small industry. It was good experience, but long-term, I seek to return soon to a public accounting environment whereby I can work, be challenged, and grow as a professional by serving clients across the board in one large industry group and/or across several industries. Moreover, the environment at G. McKittrick Moses was tense and with animosity. Accordingly, I submitted my notice in June to focus full-time on my job search and find a long-term fit in public accounting.

- Implemented policies and procedures to ensure compliance with new tax laws
- Responsible for tax evaluation of new financial instruments in security reviews
- Generated models to access tax-efficient strategies / tax-deferred products. Illustrated benefits to clients.
- Analyzed straddle system according to IRC Sec. 1092 and Sec. 1256 and recommended system changes
- Established procedures for identifying foreign qualified dividends
- Reviewed all shareholder forms for compliance with new tax law (JGTRRA), updated the tax manual and created web-based intranet tax training modules
- Provided technical review of articles published in *McVestor* and other G. McKittrick Moses' publications
- Responded to shareholder inquiries on topics from foreign tax credits to municipal interest exemptions
- Provided skills assessment of tax department candidates
- Served as liaison between Investment Tax and other internal departments
- Recognized with award for excellent client support

Senior Tax Associate, Apples & Oranges, LLP, Columbus, Ohio **Jan. Year – April Yr** **Apples & Oranges, LLP (F/K/A Arthur Andersen, LLP), Columbus, Ohio**

Reason for Leaving: Within six months after the merger of (Big 5 firm) Arthur Andersen's Columbus office into (Big 5 firm) A&O, I was doing 100% tax compliance. My increasing preference then and now is for a balance of both tax compliance and tax consulting, yet A&O was not open to this. Also, in my last tax season, as a Senior Tax Associate, part of my additional responsibility was to provide remote supervision and guidance regarding U.S. tax return compliance, etc. to outsourced tax staff in India via instant messaging, yet because of the time zone difference, I was required to do this between Midnight and 3 AM my time, and this was on top of an otherwise very heavy busy season. At first, I was open to this, but the additional hours and time change wore thin. I was burned out, but finished busy season with A&O, then took some time in summer Year to consider what I wanted to do next. I like public accounting, but was attracted to G. McKittrick Moses in Sept. Year for the opportunity to do tax consulting.

- Prepared / reviewed tax compliance / consulting services. Researched new and controversial tax issues.
- Promoted to senior tax associate on an accelerated timetable
- Specialized in consolidated corporations and real estate investment trusts
- Prepared tax compliance and provided tax consulting services for individuals and businesses

Financial Services Representative, ABC Financial Group, Louisville, KY **Dec. Year – Aug. Year**

Reason for Leaving: Attended Fall semester with a full academic schedule in order to complete accounting degree.

- Obtained Maryland Insurance License
- Obtained SEC certifications: Series 7, 66 (Registered Investment Advisor and Blue-Sky)
- Designed employee benefit structures, analyzed insurance and pension needs for business

Academic Consultant, Alphatest, Inc., Louisville, KY

Sept. Year – Dec. Year

- Provided academic consultation to schools, and designed academic strategies for school groups.

EDUCATION

Bachelor of Science, Accounting with Honors, 2000. GPA: 3.9. Ohio State Univeristy, Columbus, Ohio
Emilie French Prize – For Excellence in Accounting

Bachelor of Arts, Economics with Honors, 1997. GPA: 3.7.

Bachelor of Arts, Natural Sciences, 1997. GPA: 3.4.

University of Louisville, Louisville, Kentucky

ACHIEVEMENT AND SKILLS

CPA – State of Ohio

Recognized by OACPA for scoring among the top ten exam grades in Ohio in Year.

- Accounting Software: A-Plus, AACTS, CCH Pro, Go Systems, Lexis, Peachtree, QuickBooks, Superforms
- Strong proficiency with Microsoft Windows and Office applications in a networked environment.
- Member: American Institute of Certified Public Accountants, Maryland Association of CPAs.
- Fluent in Korean, and proficient in Italian and Spanish.