

Michael Chen, CPA

Senior Accountant | Financial Reporting & Tax Specialist

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Professional Summary

Detail-oriented Certified Public Accountant with over 9 years of experience in financial reporting, tax compliance, and strategic advisory for mid-market and enterprise clients. Proven track record of optimizing accounting workflows, reducing tax liabilities by an average of 18% annually across client portfolios, and leading audit engagements with zero material findings for four consecutive years. Adept at translating complex financial data into actionable business insights for C-suite stakeholders.

Core Competencies

- GAAP & IFRS Reporting
- Tax Planning & Compliance
- Financial Statement Prep
- Internal Controls & SOX
- Audit & Assurance
- Budgeting & Forecasting
- Cash Flow Management
- Mergers & Acquisitions
- ERP Implementation
- Variance Analysis
- Payroll & 401(k) Admin
- Risk Assessment
- Revenue Recognition
- Cross-Functional Leadership
- Client Relationship Mgmt

Professional Experience

Senior Accountant

Apex Financial Group

Jan 2022 – Present

San Francisco, CA

- Lead month-end close for a \$120M portfolio across 14 corporate entities, reducing close cycle from 8 days to 5 days through workflow automation.
- Manage a team of 4 staff accountants; oversee general ledger reconciliation, AP/AR, and fixed asset schedules with 100% on-time completion.
- Spearheaded adoption of ASC 606 revenue recognition standards, ensuring full compliance across all service-line contracts.
- Partnered with external auditors during annual reviews; resolved 22 audit queries within the first week, earning commendation for preparedness.

Staff Accountant

Meridian Tax & Advisory

Mar 2018 – Dec 2021

Oakland, CA

- Prepared and reviewed federal and multi-state tax returns (1120, 1120S, 1065, 1040) for 60+ business and individual clients annually.
- Identified \$340K in overlooked R&D tax credits for three technology clients, resulting in amended returns and refunds.
- Built Excel-based forecasting models that improved quarterly budgeting accuracy by 22% for a \$40M manufacturing client.
- Assisted in due diligence for two M&A transactions totaling \$85M, analyzing target-company financials and flagging contingent liabilities.

Junior Accountant

Vertex Capital Management

Jun 2015 – Feb 2018

San Jose, CA

- Processed daily journal entries and maintained the general ledger for a \$30M investment fund, reconciling 200+ accounts monthly.
- Automated recurring journal entry templates in NetSuite, saving 10 hours per month of manual data entry.
- Supported annual 1099 preparation and filing for 350+ contractors and vendors with zero late-filing penalties.

Education

Master of Science in Accounting

Nimbus State University
GPA: 3.82 | May 2015

Bachelor of Science in Finance

Synapse University
GPA: 3.75 | May 2013

Certifications & Licenses

- **CPA** – California Board of Accountancy, License #CA-48721 (Active)
- **Certified Management Accountant (CMA)** – IMA, 2019
- **QuickBooks ProAdvisor** – Advanced Certification, 2020
- **Enrolled Agent (EA)** – IRS, 2017

Technical Skills

Accounting Platforms	NetSuite, QuickBooks Online, Sage Intacct, Xero, FreshBooks
Tax Software	UltraTax CS, Lacerte, ProConnect Tax Online, Drake Tax
ERP Systems	SAP S/4HANA, Oracle Financials, Nimbus Dynamics 365
Audit Tools	CaseWare, IDEA, ACL Analytics, MindBridge Ai Auditor
Spreadsheets & BI	Advanced Excel (VBA, Power Query), Tableau, Power BI
Payroll & HRIS	ADP Workforce Now, Gusto, Paychex Flex, BambooHR
Compliance	SOX 404, COSO Framework, COBIT 2019, GDPR financial controls

Key Achievements

- Reduced client tax liabilities by \$2.1M cumulatively over 5 years through strategic tax-loss harvesting and entity restructuring.
- Led ERP migration from legacy QuickBooks Desktop to NetSuite for a \$60M company, completed on time and 12% under budget.
- Detected and corrected a \$180K payroll tax discrepancy during a routine quarterly review, avoiding potential penalties.
- Designed a standardized month-end close checklist adopted across 3 offices, cutting variance resolution time by 35%.