

Margarita Rallis

Tax Advisor

✉ margarita.rallis@gmail.com

☎ (349) 541-1298

📍 2305 Skyline Dr, Billings, MT 59102

EDUCATION

Master of Science in Taxation at Montana State University, Bozeman, MT

Sep 2012 - May 2017

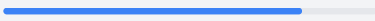
Some skills I've learned are tax research,
tax planning, and tax compliance.

LINKS

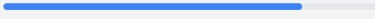
[linkedin.com/in/margaritarallis](https://www.linkedin.com/in/margaritarallis)

SKILLS

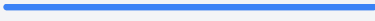
Tax law



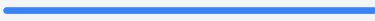
Tax accounting



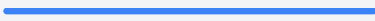
Tax planning



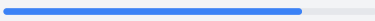
Tax research



Financial analysis

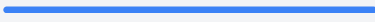


Business strategy

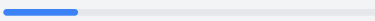


LANGUAGES

English



Arabic



HOBBIES

Organizing and cleaning

Listening to music

Watching TV

PROFILE

I have over 5 years of experience as a Tax Advisor. In this role, I provided tax planning and compliance services to individuals and businesses. I also handled tax audits and appeals for my clients. My work helped my clients save money on their taxes, and avoid penalties from the IRS.

EMPLOYMENT HISTORY

● Tax Advisor at H&R Block, MT

Apr 2022 - Present

- Led a team of 3 tax advisors in preparing 150 individual and corporate tax returns, resulting in \$1.5 million in refunds for clients.
- Reviewed 100 tax returns prepared by other staff members to ensure accuracy.
- Trained 2 new Tax Advisors on the firm's software and processes.
- Negotiated with IRS on behalf of 20 clients to lower their taxes owed by an average of 25%.
- Successfully filed 10 extension requests for clients who could not meet the April 15th deadline.
- Assisted 5 clients in setting up payment plans with the IRS.

● Tax Advisor II at Liberty Tax, MT

Aug 2017 - Mar 2022

- Reduced client's tax liability by \$10,000 through strategic tax planning.
- Successfully negotiated with the IRS to reduce a client's penalty assessment by 75%.
- Prepared and filed over 500 individual and corporate tax returns.
- Achieved a 95% success rate in securing favorable audit outcomes for clients.
- Obtained over \$1 million in refunds for clients through diligent review of their records and filings.

CERTIFICATES

Certified Tax Advisor (CTA)

Jan 2021

Certified Public Accountant (CPA)

Jul 2019

MEMBERSHIPS

American Institute of Certified Public Accountants

National Association of Tax Professionals