



# Senior Corporate Tax Associate

## Simone Peterson

### Professional summary

Senior Tax Associate with over 9 years of experience in corporate tax compliance, financial reporting, and tax strategy. Skilled in reducing tax liabilities, ensuring regulatory compliance, and advising Fortune 500 companies on federal and state tax matters. Looking to leverage expertise at Grant & Lawson LLP to optimize corporate tax planning and compliance strategies.

### Experience

#### Senior Tax Associate

June 2020 - Now

Harrison & Adler Tax Advisory / Chicago, IL

- Manage corporate tax compliance for mid-to-large-size businesses, ensuring adherence to IRS regulations and state laws.
- Develop tax planning strategies that reduced corporate tax liabilities by 12% for key clients.
- Assist in M&A due diligence, assessing tax implications and structuring transactions to maximize tax efficiency.
- Prepare and review federal and multi-state tax returns for clients in manufacturing, retail, and financial services.
- Lead training sessions for junior associates on corporate tax regulations and tax software applications.

#### Tax Associate

May 2016 - June 2020

Westfield & Co. Tax Firm / Chicago, IL

- Assisted in preparing corporate tax filings, ensuring timely submission and compliance with tax laws.
- Conducted research on changes in tax legislation and advised clients on potential impacts.
- Collaborated with auditors and finance teams to provide accurate tax provision calculations.
- Utilized CCH Axcess and Bloomberg Tax to analyze client tax data and identify potential risks.

### Professional Affiliations

- Member, American Institute of Certified Public Accountants (AICPA)
- Member, Illinois CPA Society
- Contributor, Corporate Tax Journal

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### Education

#### Master of Science in Taxation

DePaul University, Chicago, IL

2016

#### Certified Public Accountant (CPA)

Illinois Board of Examiners

2017

### Skills

Corporate tax compliance



GAAP and IFRS knowledge



Federal and state tax returns



Tax strategy and planning



Financial statement analysis



IRS audit preparation



Mergers and acquisitions tax impact



Advanced Excel and SAP proficiency



Risk assessment



Client advisory and relationship management

