5971 River Forest Circle, Bradenton, FL 34203
Cell: 941-465-1125 Email: heatherwilliamscpa@yahoo.com

HEATHER M. WILLIAMS

OBJECTIVE

Highly motivated CPA with years of accounting experience in offering complex income tax, financial planning and wealth transfer solutions to both high net worth individuals and their complex trusts. Energetic, hard-working individual seeking an adjunct faculty position at the University of South Florida utilizing excellent knowledge of accounting and taxation and the ability to communicate lessons effectively.

PROFESSIONAL EXPERIENCE

KERKERING, BARBERIO & CO. Sarasota, FL

Manager, Estate & Trust, Tax Services 2010 – Present

- Provided tax planning and consulting for clients financial, estate, and trust taxation, and individual income taxes.
- Manage, develop, train, and mentor staff on tax projects and assess performance for engagement and year-end reviews.
- Lead and participate in weekly and monthly presentations to team on technical topics.
- Review and signing of individual, trusts, estates, and gift tax returns.
- Research in federal estate, gift, charitable planning, and generation-skipping tax arenas.
- Maintain active internal communications ensuring deadlines are met, and driving success of internal processes.

GRANT THORNTON, LLP Charlotte, NC

Manager, Private Wealth Services, Tax Services 2007 – 2010

- Provided tax planning and consulting to high net worth clients for estate, wills and trusts taxation, and individual income taxes. Interact closely with client's other advisors such as attorneys and financial asset managers.
- Manage the efforts of multiple client services teams on client engagements; plan, execute, direct, and complete tax projects; provide innovative tax planning, consulting, and compliance expertise to clients; market, sell, design, and implement tax-planning strategies for clients.
- Manage, develop, train, and mentor staff on tax projects and assess performance for engagement and year-end reviews; including serving as instructor for internal continuing education.
- Review and signing of individual, trusts, estates, gift, partnership, and S-Corporation tax returns.
- Research and consult on tax matters, primarily in the federal estate, gift, charitable planning, and generation-skipping tax arenas.
- Maintain active communication with clients to manage expectations, ensure satisfaction, make sure deadlines are met, and lead change efforts effectively.
- Maintain strong client relations and cross-sell services within the group of clients.
- Recruited and facilitate environment to retain senior associates and associates.
- Lead and participated in bi-monthly presentations and preparation of training in technical topics of Estate, Gift, and Trust tax planning.
- Presentation to GT Carolina's Women in Business programs, developed materials and moderated panelist.

Senior Associate, Private Wealth Services, Tax 2005-2007

- Managed client engagements from start to finish, which includes planning, executing, directing, and completing tax projects and managing to budget.

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- Review of individual, trusts, estates, gift, partnership, and S-Corporation tax returns.
- Participated in review/summarize client's estate documents, including wills, trusts, etc.
- Review prior year tax returns to look for potential errors, inconsistencies, and opportunities,
- Extensive experience in financial modeling and analysis, for both tax, estate and cash flow planning.

Associate, Private Wealth Services, Tax Services 2003 – 2005

- Preparation of individual, trusts, estates, gift, partnership, and S-Corporation tax returns.
- Supervise, train, and mentor associates and interns on tax projects and assess performance of staff for engagement reviews; perform in-charge role as needed.
- Participated on team to provide tax compliance consulting services to significant Estate planning and compliance project

EDUCATION

2002 – 2003 Florida State University Tallahassee, FL
Masters in Taxation

1999 – 2002 University of South Florida Tampa, FL
Bachelor of Business Administration, Major Accounting and Major Finance

- Extensive leadership involvement in student organization and community activities
- Alpha Kappa Psi Executive Board

1997 – 1999 Jacksonville University Jacksonville, FL
Bachelor of Business Administration

- Scholarship team member of Division I Crew Team

PROFESSIONAL CERTIFICATION

- Certified Public Accountant, Florida & North Carolina
- Certified Financial Planner

PROFESSIONAL AND COMMUNITY INVOLVEMENT

- American Institute of Certified Public Accountants and Florida Institute of CPAs
- Young Leaders Alliance of LWR, Founding Member and Treasurer 2012-2014, 2015 Chair Elect
- Mote Marine Advisory Council Board Member
- Leadership Sarasota Alumni 2011-2012
- Southwest Florida Estate Planning Council
- William H. Bashaw Elementary Active Board Involvement (President 2012-2014)
- Risk Management Association Women in Business Panelist August 2014

REFERENCES

Available upon request