JULIAN MERCER

TAX ACCOUNTANT

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PROFESSIONAL SUMMARY

Tax Accountant with 6+ years preparing and reviewing corporate and individual returns, researching technical issues, and supporting quarterly provisions. Delivers accurate filings before deadlines, finds legitimate savings, and explains tax positions clearly to clients and finance leaders.

PROFESSIONAL EXPERIENCE

Tax Accountant May 2024 - Present
Intuit, Mountain View, CA

- Prepare federal and state income tax provision workpapers each quarter, tying deferred tax balances to the general ledger.
- Filed 35 state returns and extension requests on time with zero penalties across two filing seasons.
- Researched apportionment and nexus questions for new product lines and wrote memos that guided filing decisions in four states.
- Identified unclaimed research credit expenses in project accounting data, adding about $230K to the annual credit claim.
- Responded to two state notices with supporting schedules, resolving both within 45 days at no additional tax.

Tax Senior Associate Aug 2022 - Apr 2024
PwC, San Jose, CA

- Prepared and reviewed 90 partnership and S corporation returns for technology and real estate clients each busy season.
- Calculated estimated tax payments and projected liabilities for 25 clients, avoiding underpayment penalties in nearly every case.
- Reviewed work from two staff accountants and gave written feedback that shortened second-round review cycles.

Tax Associate Sep 2021 - Jul 2022

- Prepared 60 partnership and individual returns for technology clients, passing manager review with few comments.
- Researched IRS guidance and case law for entity restructuring questions and summarized options in client-ready memos.
- Reconciled state apportionment schedules to source financials, correcting rate errors before filing.

Tax Associate Jul 2020 - Aug 2021
BDO, San Francisco, CA

- Entered client source data into tax software for 80 individual and partnership returns and flagged missing documents to preparers.
- Built a document checklist for new clients that cut follow-up emails during intake by about a quarter.
- Tracked sales tax exemption certificates for a retail client and kept the master list current.

CORE SKILLS

Tax compliance | Tax research | Income tax provision | ASC 740 | State and local tax | Sales and use tax | Partnership taxation | R&D tax credits | CCH Axcess | Thomson Reuters ONESOURCE | Excel | Tax notices | Deferred taxes | Client communication

EDUCATION

Master of Science in Taxation, Santa Clara University, Santa Clara, CA

CERTIFICATIONS

Certified Public Accountant (CPA) | IRS Enrolled Agent (EA)