JULIAN MERCER

TAX PREPARER

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PROFESSIONAL SUMMARY

Tax Preparer with 7 seasons preparing individual and small business returns, including self-employed, rental income, and multi-state filers. Holds an IRS Annual Filing Season Program credential and files accurate returns, with a low rejection rate and strong client retention.

PROFESSIONAL EXPERIENCE

Tax Professional Jan 2022 - Present
H&R Block, Columbus, OH

- Prepare about 420 federal and state returns a season, including Schedule C, Schedule E, and itemized returns, with a rejection rate under 1.5%.
- Retained 78% of returning clients by reviewing prior-year return changes at the start of each appointment and sending a year-round reminder email.
- Identified missed credits and deductions for 60 clients, including education credits and home office expense, adding an average $640 to each refund.
- Handled IRS and state notice responses for 25 clients, drafting letters and documenting proof of income and dependents.
- Trained three seasonal preparers on interview questions and due diligence for the Earned Income Tax Credit.
- Worked with self-employed clients in the off-season to set up quarterly estimates and track mileage and expenses.
- Wrote engagement and document-security procedures that keep client files encrypted and cut paper intake by about 70%.

Tax Preparer Jan 2020 - Apr 2021
Jackson Hewitt, Dublin, OH

- Prepared about 300 individual returns in the first season and met the office goal for e-file accuracy.
- Switched to remote document intake during the pandemic and kept appointment volume near the prior year's.
- Handled amended returns and unemployment income adjustments for 40 clients with no returned items.
- Interviewed each client about life changes such as marriage, a new child, or a home purchase, and applied the matching credits and filing status.
- Reconciled income documents such as W-2s, 1099s, and 1098s against client records before filing and caught missing forms in about one of eight appointments.
- Explained refund timing and tax planning to first-time filers and answered about 15 questions a day at peak.

Bank Teller and VITA Volunteer Jun 2018 - Dec 2019
Huntington National Bank, Columbus, OH

- Completed about 150 transactions a day with a balanced drawer and helped customers with account and tax-refund deposits.
- Prepared free returns as an IRS VITA volunteer for about 80 low-income households in a single season, certified at the advanced level.
- Learned tax software and compliance practice before entering a full-time preparer role.

CORE SKILLS

Individual return preparation | Schedule C and Schedule E | EITC due diligence | Multi-state returns | Amended returns | IRS notice response | Tax software | Client interviewing | Estimated tax planning | Document security | Mileage and expense records | E-file rejection resolution | Client retention

EDUCATION

Associate of Applied Science in Accounting, Columbus State Community College, Columbus, OH

CERTIFICATIONS

IRS Annual Filing Season Program Record of Completion | IRS Preparer Tax Identification Number (PTIN) | IRS VITA/TCE Advanced Certification