Kevin Tran

Entry-Level Tax Preparer

Houston, TX • (713) 555-0162 • kevin.tran@email.com
linkedin.com/in/kevintran

SUMMARY

Accounting graduate from Houston Community College with 2 VITA filing seasons of tax preparation and 85 Form 1040 returns that passed IRS quality review. Now does data entry in Drake Tax and handles client calls at a CPA firm during extension season. Holds a PTIN and explains tax documents in plain language.

EDUCATION

Associate of Applied Science 05/2026

Houston Community College Houston, TX

Accounting

EXPERIENCE

Office Assistant (Part-Time) 05/2026 - Present

Westchase Tax & Accounting Houston, TX

Small CPA firm preparing about 900 individual and small-business returns a year.

- Process client tax documents into the firm portal for **350+** returns during the October extension season.
- Record W-2, 1099 and Schedule C data in Drake Tax for preparer review, with under 2% of entries sent back.
- Handle about 40 client calls a day on missing documents, refund status and appointments with clear customer service.
- Verify client payments in Excel each week and report unpaid invoices to the office manager.

VITA Volunteer Tax Preparer 01/2025 - 04/2026

Gulfton Community Tax Center Houston, TX

IRS Volunteer Income Tax Assistance site, two filing seasons.

- Completed **85** Form 1040 returns for low- and moderate-income families, all passing site quality review.
- Interviewed taxpayers with Form 13614-C to confirm filing status, dependents and credit eligibility.
- Secured about $210,000 in combined refunds for clients, mostly from EITC and child tax credit claims.

SKILLS

Tax Preparation • Form 1040 • Schedule C • Drake Tax • Data Entry • EITC • Excel • Customer Service

Interpersonal Skills

CERTIFICATES

Preparer Tax Identification Number (PTIN)

Internal Revenue Service

05/2026

VITA Advanced Certification

IRS Link & Learn Taxes

12/2025