

Kristi Schaefer

Tax Preparer and Bookkeeper

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SKILLS

- Tax Preparation & Planning (Individuals & Small Businesses)
- Bookkeeping & General Ledger Management
- Financial Reporting & Reconciliations
- IRS Compliance & Tax Law Knowledge
- Client Communication & Relationship Building
- Software: Intuit ProConnect, QuickBooks Online, Xero, TaxDome, Microsoft 365, Google Workspace

CERTIFICATIONS

IRS Enrolled Agent Exam

- Part 1: Individuals (Passed October 2025)
- Part 2: Business (Scheduled December 2025)
- Part 3: Representation (Passed August 2025)

AFSP Certificate of Completion, 2024-2026

Intuit Bookkeeper Certification, 2025

EXPERIENCE

Intuit Turbo Tax, Florida - *Seasonal Tax Associate*

- Prepares and reviews individual and business federal and state income tax returns for clients in accordance with IRS and state regulations.
- Provides expert guidance and support to clients through virtual tax preparation, ensuring accuracy and maximizing deductions and credits.
- Researches and interprets tax laws, forms, and procedures to address client questions and ensure compliance.
- Uses Intuit TurboTax software and digital tools efficiently to complete and file returns.
- Maintains confidentiality of client information and adheres to data security protocols.
- Delivers professional and courteous customer service while explaining complex tax concepts in clear, simple terms.
- Collaborate with quality assurance teams to resolve errors and improve accuracy in returns.

Schaefer Business Solutions, Florida - *Owner*

June 2025 - PRESENT

- Prepare federal and state income tax returns for individuals and small businesses, ensuring compliance with current tax laws
- Provide bookkeeping services including general ledger maintenance, bank reconciliations, and monthly financial reporting.
- Advise clients on tax planning strategies to minimize liabilities and support financial decision-making throughout the year.
- Communicate complex tax and financial concepts in clear, easy-to-understand terms to help clients feel confident about their finances.

- Manage multiple clients simultaneously, consistently meeting tax filing deadlines and delivering accurate work under pressure.

H&R Block, Florida - *Senior Tax Specialist*

November 2023 - November 2025

- Conduct tax interviews both face-to-face and virtually (via video and email)
- Prepare accurate and compliant individual and small business tax returns
- Provide clear explanations of tax obligations and liabilities to clients, as well as offer tax advice and tax planning strategies
- Assist with tax authority inquiries, advocate and mediate on behalf of taxpayers
- Provide resolutions to discrepancies and amend errors on filings
- Maintain knowledge of current IRS regulations and complete continuing annual education requirements

Sirva, Inc., Illinois - *Global Relocation Counselor*

August 2022 - Present

- Administer relocation policies, expense management, and compensation services in compliance with employee contracts and company guidelines.
- Manage and coordinate third-party vendors, ensuring adherence to service level agreements and quality standards.
- Oversee large caseloads while maintaining exceptional data accuracy and timely documentation.
- Communicate effectively across multiple countries and cultures, providing clear guidance on policies, tax implications, and required documentation.
- Resolve escalated issues efficiently to support successful relocations and maintain a high Consultant Satisfaction score (4.86/5).
- Collaborate with internal teams to ensure compliance with client policies, identify process improvements, and train colleagues on policy interpretation.
- Recognized with multiple nominations for the “Recognizing Excellence” award (2023 & 2024) for outstanding service and performance.

PACOR Mortgage, Illinois - *Junior Underwriter, Mortgage Loan Processor*

June 2020 - August 2022

- Analyzed borrower financial documentation (income, assets, credit reports) to assess creditworthiness and calculate debt-to-income ratios, ensuring compliance with federal and state regulations.
- Reviewed, verified, and prepared complete and accurate loan files for underwriting, focusing on error resolution and documentation integrity
- Collaborated with internal teams to resolve conditions and finalize approvals, improving processing efficiency and meeting strict deadlines.
- Communicated complex financial requirements clearly to borrowers, loan officers, and third-party vendors to facilitate smooth approvals.
- Maintained up-to-date knowledge of lending regulations, investor guidelines, and compliance requirements.
- Provided excellent client service by addressing discrepancies quickly and de-escalating potential issues with professionalism and empathy.

Community Loans of America, Illinois - *Branch Manager*

April 2019 - July 2020

- Oversaw daily financial operations, ensuring accuracy of transactions, loan applications, and branch records.
- Audited loan files to ensure compliance with state regulations and company policies
- Managed branch performance, focusing on revenue growth through new loans and refinancing strategies.
- Hired and trained staff, providing coaching on customer service best practices.

MILITARY EXPERIENCE

- **U.S. Army**
- **Illinois National Guard**