

# Terria Thorstensen

Tax Advisor

## Profile

Results-driven Tax Advisor with 2 years of experience in providing strategic tax planning and compliance services to clients. Adept at identifying tax-saving opportunities and efficiently managing tax liabilities. Demonstrates strong analytical and problem-solving skills with a keen attention to detail. Proven ability to effectively communicate complex tax concepts to clients and build lasting relationships. Committed to staying current on tax law changes and industry trends to deliver optimal results.

## Employment History

### Senior Tax Advisor at Anderson Tax Advisors, MI

Mar 2023 - Present

- Successfully managed a diverse portfolio of over 200 clients, resulting in a 98% client retention rate and generating \$1.5 million in annual revenue for Anderson Tax Advisors.
- Implemented innovative tax strategies and planning for high net worth clients, saving an average of \$250,000 per client in tax liabilities and increasing overall client satisfaction by 20%.
- Led a team of 5 junior tax advisors, providing mentorship and guidance that contributed to a 30% increase in their productivity and efficiency, ultimately boosting the firm's revenue by an additional \$500,000 annually.

### Tax Advisor at Financial & Tax Planning Services, MI

Jul 2021 - Jan 2023

- Successfully saved clients over \$1 million in tax liabilities by implementing strategic tax planning and advising on deductions, credits, and deferrals.
- Conducted a comprehensive review of over 500 client tax returns, identifying errors and discrepancies that resulted in an average refund increase of \$2,000 per client.
- Streamlined the tax preparation process for the firm, reducing the average time spent on each return by 25% and increasing overall client satisfaction by 20%.

## Certificates

### Certified Public Accountant (CPA)

Jan 2022

### Enrolled Agent (EA)

Feb 2020

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## Education

### Bachelor of Science in Accounting and Finance at University of Michigan, Ann Arbor, MI

Aug 2017 - May 2021

Relevant Coursework: Financial Accounting, Managerial Accounting, Corporate Finance, Financial Management, Auditing, Taxation, Financial Statement Analysis, and Investment Strategies.

## Links

[linkedin.com/in/terriathorstensen](https://www.linkedin.com/in/terriathorstensen)

## Skills

Taxation laws

Financial analysis

Compliance management

Tax planning

Risk assessment

Client communication

Research proficiency

## Languages

English

Spanish

## Hobbies