

RACHEL DETERT

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EMPLOYMENT HISTORY

Senior Tax Manager, Baker Tilly Virchow Krause

Tax Manager

September 2019 - present
July 2016 – August 2019

Milwaukee, WI

- Review and sign individual and trust income tax returns for high-net-worth taxpayers and business owners.
- Manage and review QuickBooks files for several small family businesses.
- Assist high net worth taxpayers on tax planning opportunities and impacts of business decisions.
- Research various tax positions, issues and treatment especially surrounding the passage of the Tax Cuts and Jobs Act and the CARES Act.
- Meet with taxpayers to discuss estate planning needs and run various scenarios to show benefits of charitable planning, and wealth transfer before death.
- Manage workloads and schedules for team members and facilitate weekly meetings to ensure work is being completed in time for IRS and client deadlines.
- Manage budgets for client work and ensure timely billing of work completed. Responsible for identifying opportunities to complete work more efficiently.
- Act as an international tax resource in the Midwest region, providing guidance on the impact of foreign investments as well as the movement of taxpayers overseas.

Tax Accountant, Goossen & Schultz CPAs, LLP

January 2015 – June 2016

Milwaukee, WI

- Prepare and review federal and state income tax returns for inpatriate and expatriate individual taxpayers.
- Prepare and review tax equalization calculations to compare the taxpayer's stay-at-home tax liability to the amounts grossed up and withheld from their pay.
- Consult with first year United States taxpayers to explain the United States tax system and the terms of their assignment including imputed wage items and tax equalizations.
- Prepare year-end payroll adjustments to include imputed income and related gross-ups in employee's wages.
- Assist in preparing expatriate projections for various Milwaukee companies to analyze the year over year cost to the company of sending employees overseas.

Tax Senior Associate, PricewaterhouseCoopers

Tax Associate

July 2013- December 2014
January 2011- June 2013

Chicago, IL

- Prepared and reviewed federal and state individual, trust, estate, and gift tax returns.

- Prepared and reviewed federal and state estimated tax calculations and vouchers for individual taxpayers.
- Communicated with clients to obtain information necessary to complete tax returns and discuss potential current and future tax issues.
- Assisted individual taxpayers under IRS and state income tax audits by researching tax positions, preparing supporting workpapers, and drafting response letters.
- Assisted in advising high net worth individuals on the topics of tax efficient investment and estate planning.
- Led workshops for clients to educate their employees on retirement and financial planning strategies.

Tax Intern, PricewaterhouseCoopers

January 2010-April 2010

Boston, MA

- Prepared partnership tax forms and supporting workpapers for a major venture capital/private equity firm in the Boston area.
- Received full time offer as a tax associate upon completion of internship.

Intern, PMA Financial Network

October 2008-August 2010

Milwaukee, WI

- Reconciled month-end bond portfolio management reports and bank reconciliations for various Wisconsin school districts.
- Ensured timely completion of data entry to assist in the analysis of school district financial statements.

EDUCATION

Northeastern University, Boston, MA
Master of Science Taxation

December 2019

Marquette University, Milwaukee, WI
Bachelor of Science Accounting, Bachelor of Science Information Technology

December 2010

CERTIFICATION

Certified Public Accountant, State of Wisconsin and State of Illinois

LEADERSHIP & ACTIVITIES

- Baker Tilly Individual Services Milwaukee Team Leader (2017 – 2021)
- Baker Tilly GROW (Growth and Retention of Women) Leadership Committee (2019-2020)
- Baker Tilly Performance Counselor (2016-2021)
- Baker Tilly Lunch and Learn Coordinator (2017 – 2020)
- PwC People First Committee Member (2013-2014)
- PwC Intern Buddy/Coach (2011-2013)
- PwC Training Instructor (2012-2014)