

TAX EXAMINING CLERK

Summary

Driven claim specialist bringing 10 years experience in the field of insurance with an emphasis on automobile claims. Trained in all aspects of insurance property and liability claims. Employs high-level negotiation skills in resolving claims to the satisfaction of all involved parties. Analytical thinker and innovative problem solver.

Highlights

- Property and liability claims adjusting
- Thorough in critical thinking
- Analyze problems and develop favorable solutions
- Time management and organization
- Proficient in math, computer skills and Excel, Word and Access programs
- Effective interpersonal, listening and communication skills
- Multi-task and prioritize
- Pacify irate people

Experience

Company Name January 2013 to June 2015 Tax Examining Clerk

City, State

- Adjust tax liability on 1040X amended returns.
- Take corrective actions to process and close a case, such as adjusting taxpayer's account, penalties or credits, and computing tax liability.
- Research pertinent tax data through IDRS, databases, accounting records and available relevant systems.
- Assign case referrals requiring further examination per the tax code.
- Recognize indications of tax fraud.
- Process statute and potential statute cases, and ensure that all statutes are correct.
- Recognize problem areas with reference material and offer solutions.
- Maintain a fully successfully level processing over 11.2 documents per hour with virtually a 100% accuracy rate.

Company Name September 1997 to December 2010 Business Owner/Manager

City, State

- Managed the operational activities of a dairy distribution business.
- Maximized company revenue by creating databases and spreadsheets to improve inventory control and cost-and-risk analysis.
- Maintained account plans for 100 customer accounts.
- Improved communication efficiency as primary liaison for customers and vendors.
- Maintained high levels of customer satisfaction through offering after-hour deliveries and preserving positive customer rapport.
- Identified key growth opportunities for the business through expansion of our product line and delivery area.
- Leveraged knowledge of customers and market trends to successfully market our suppliers' products.
- Coordinated Customer and Vendor orders.
- Prepared procedural material for employees.
- Wrote correspondence for business proposals and collection.
- Renegotiated payment terms with dozens of suppliers.
- Verified details of transactions, including funds received and total account balances.
- Calculated figures such as discounts and credits.
- Suggested process improvements to secure prompt and regular receipts for the company.
- Deposited third party checks, as well as monthly reserve transfers.
- Researched and resolved billing and invoice problems.
- Scheduled deliveries.
- Conducted month-end balance sheet reviews and reconciled any variances.
- Communicated with customers via phone, email and in person to obtain payments on outstanding accounts.

Company Name September 1990 to February 2000 Claim Specialist

City, State

- Process first and third-party auto liability and property damage claims in accordance with laws, regulations and policies.
- Reduced loss ratios through fair and prompt processing of claims.
- Identified and collected evidence and determined its value to a specific claim.
- Interviewed claimants, witnesses, medical and vehicle specialists, and law enforcement to determine pertinent claim information.
- Gathered detailed information and completed field investigations.
- Coordinated with attorneys and testified at criminal proceedings.
- Conducted claim and estimate re-inspections.
- Analyzed repair estimates.
- Obtained all necessary information to complete proper evaluation of property and injury claims.
- Contacted injured parties and legal representatives to negotiate final settlements for claims.
- Communicated with insured and claimants to explain computations.
- Interpret policy and explain appropriate coverages to insureds and claimants.

- Offer company solutions to improve claim closures.
- Evaluate and negotiate total losses and Bodily Injury claims.
- Access available resources via the computer and/or storage files.
- Inspect property to determine damages.
- Recognize potential subrogation and prepare files accordingly.
- Trained and mentored 3 new members of the claim staff.

Company Name January 1986 to January 1988 Customer Service Representative
City , State

- Managed the receptionist area, including greeting visitors and responding to telephone and in-person requests for information.
- Maintained electronic and paper files.
- Wrote reports and correspondence from dictation and handwritten notes.
- Dispersed incoming mail to correct recipients throughout the office.
- Made copies, sent faxes and handled all incoming and outgoing correspondence.
- Managed daily office operations and maintenance of equipment.
- Verified that information in the computer system was up-to-date and accurate. Answered customers' questions and addressed problems and complaints in person and via phone.
- Helped customers select products that best fit their personal needs.
- Educated customers on product and service offerings.
- Balanced the needs of multiple customers simultaneously in a fast-paced retail environment.
- Built and maintained effective relationships with peers and upper management.
- Cashiering.
- Research and resolve customer problems.
- Programmed and repaired pagers.
- Processed shipments and maintained organized stock shelves.
- Computed sales prices, total purchases and processed payments.
- Wrote reports and correspondence from dictation and handwritten notes.

Experience

Investigated and resolved claims using uncover and supply necessary facts to resolve the claim. Evaluated all evidence with the ultimate goal of creating positive outcomes for client's claims.

Chronology

Company Name Tax Examining Clerk

City , State

Education

California State University of San Bernardino Bachelor of Science Degree : Computer Science City , State , San Bernardino GPA: GPA: 3.13

Computer Science GPA: 3.13

Skills

accounting, Accounts Payable and Receivable, Cashiering, CA, CPT, Data entry, databases, ICD-9, Inspect, Inventory Control, Access, Microsoft Access, Excel, policies, profit, programming, proposals, Reconciling, maintain files, Research, sales, San, Scheduling, tax, telephone