AL KARIM USMAN

U.S. TAX PREPARER | FORMS 1040, 1065 & 1120-S | CCH AXCESS TAX

Candelaria, Quezon, Philippines | +63 950 275 3748 | karimusman23@gmail.com
LinkedIn | Tax portfolio & software demos (fictional training cases)

PROFESSIONAL PROFILE

U.S. Tax Preparer with supervised real-client experience preparing Forms 1040, 1065 and 1120-S in CCH Axcess Tax. Prepared workpapers, entered returns, calculated and reconciled tax items, resolved diagnostics and addressed reviewer comments. ProConnect Tax and Drake Tax experience comes from separate fictional training cases. Supported by 3+ years of UK bookkeeping and tax-preparation support.

U.S. TAX PREPARATION EXPERIENCE

U.S. Tax Preparation Intern

Jul 2025 – July 2026

Borderless Accountants | Supervised real-client engagements

- **Real-client return preparation.** Prepared Forms 1040, 1065 and 1120-S in CCH Axcess Tax under supervision, using supporting documents to prepare workpapers and enter client tax data.
- **Tax calculations and reconciliation.** Calculated relevant tax items, organized return schedules and reconciled key amounts to W-2, 1099, Schedule K-1 and other client records.
- **Diagnostics and reviewer feedback.** Investigated return diagnostics, corrected supported entries, responded to reviewer comments and updated workpapers as needed.
- **Separate software training.** Completed fictional return cases and public demonstrations in ProConnect Tax and Drake Tax without using confidential client information.

U.S. TAX PREPARATION SKILLS

Return preparation: Forms 1040, 1065 and 1120-S; W-2, 1099 and Schedule K-1 review; Schedules A, C, D and E; deductions, credits and return reconciliation.

Workpapers and review: Source-document analysis, tax calculations, accurate data entry, diagnostic resolution, reviewer-comment responses and organized handoff notes.

Software: CCH Axcess Tax (supervised real-client internship); ProConnect Tax and Drake Tax (fictional training/practice); Microsoft Excel; QuickBooks Online/Desktop; Xero.

PROFESSIONAL EXPERIENCE

Bookkeeper | UK Tax Preparation Support

Feb 2023 – Present

JRA & Co. Accounting and Consultancy Services Ltd (UK) | Remote

- **UK tax support.** Compiled financial schedules, reconciled source records and investigated missing information for Self Assessment and limited-company tax work.
- **Multi-client bookkeeping.** Maintained AP/AR, invoicing, payroll, expenses and journal entries for UK service, retail, consulting and hospitality clients.
- **Close and reporting.** Completed bank and credit-card reconciliations, general-ledger and trial-balance checks, and prepared P&L, balance-sheet and cash-flow reports.
- **Receivables follow-up.** Supported outstanding-invoice follow-up through aging reviews and proactive communication.

Technical Support Representative → SME / Process Trainer

Jun 2018 – Feb 2023

TCL Online Services Incorporated | Philippines

- **Training and quality.** Progressed to SME and Process Trainer responsibilities and coached new hires on compliance, documentation and customer communication.
- **Transferable review skills.** Validated high-volume records, tracked exceptions and reviewed escalations to improve process accuracy.

CERTIFICATIONS & EDUCATION

U.S. tax training: Individual Tax Preparation, Business Tax Preparation and U.S. Tax Preparation Internship Program — Borderless Accountants.

Accounting: QuickBooks Online ProAdvisor (Levels 1 and 2); Xero Advisor and Payroll; TESDA Bookkeeping NC III; Lean Six Sigma Yellow Belt.

Education: B.S. Accountancy coursework (undergraduate), Trimex Colleges; Computer Technology, Computer Site Institute Inc.

Awards: TCL Best Agent of the Year (2019); Outstanding Employee of TCL Overseas.