

**MARK NEWLAND, E.A., C.P.A.**

South San Francisco, CA | Mt. Vernon, WA | Vancouver, BC

650.464.1776

[marknewland8@gmail.com](mailto:marknewland8@gmail.com)<http://www.linkedin.com/in/marknewland>**SUMMARY**

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- Tax:** Lacerte, Drake, UltraTax, ProSystem fx / Axxess, CCH, RIA, XCM, CaseWare.  
U.S. and Canadian income tax for corporations, partnerships, individuals, NPO's, trusts and estates.  
Sales tax, VATs, HST, GST, PST. Expatriate compliance and consulting.
- Attest:** Engagement (e-pace), PPC, Adobe (flyer / tic tie + calculate), MS Office; Outlook, Word, Excel  
Financial, governmental and single audits A-133, A-122, NPO's. Audits, reviews and compilations.
- Other:** QuickBooks; QBD, QBO, AppFolio, bookkeeping, consulting, tax research and memos, projections and forecasts. Tax Planning for company and employee stock options.

**EXPERIENCE**

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**Alpha B Group****(Acquired by Unified Global, CA)****(Acquired by DMP Management, WA)**

Santa Clara, CA

**08/2020 – Present***Accountant*

- Individual and associated business federal and state tax.
- HNWI/HNII, stock options, RSU, NQSO, ESPP, ISO and associated tax planning.
- Corporations, provisions, tax planning. Tax research F3115
- Individual expatriate, multistate, FBAR, FATCA, and foreign trusts. F (114, 5471, 5472, 8848, 8854)
- Lacerte, Nitro, Karbon

**Daniel Raval, E.A., C.P.A.***Tax Manager*

Daly City, CA

**06/12 – Present**

- Individual and associated business federal and state tax; CODs. I.R.S. audits & letters
- Income tax: 1040, 1041, 1065, 1120, 1120S, 990s, Calif. Specific –SMLLC, Disregarded Entities
- Multi state and international partnerships, corporations, and individuals.
- Gift, estate, RDP, sales tax, I.R.S. audits and letters.
- Individual expatriate, multistate, FBAR, FATCA, and foreign trusts. F (114, 5471, 5472, 8848, 8854)

**AGT, an Accountancy Corporation****(Matson and Isom spin off as AGT)****(Nystrom and Company acquired by Matson and Isom)**

Redding | Mount Shasta, CA

*Tax Manager / Auditor***07/17 – 06/2020**

- Income tax: Lacerte; 990, 1065, 1120, 1120S, 1040, 1041, SMLLC. Individual tax planning.
- Audit: Engagement + Knowledge Coach; Financial and governmental A-133 audits.
- Consulting: tax implication of legal issues, scenarios, projections and forecasts.

**SDM & Associates***Tax Accountant*

San Francisco, CA

01/16 – 07/17

- Income tax: 990, 1065, 1120, 1120S, 1040, SMLLC. Individual tax planning.
- Various projects; offer in compromise, payroll set up, foreign persons and entities in the U.S.
- Pro fx, Engagement and Adobe. QuickBooks and QBO.

**Williams Adley & Co.***Senior Tax Manager*

Oakland, CA

01/12 – 06/12

- Prepare and review outsourced tax returns.
- Review outsourced tax returns via XCM.
- Research tax law and consult clients about tax matters.

**Collins Barrow (Acquired by Baker Tilly WM LLP 2019)***Consultant of International Tax and U.S. tax matters*

Vancouver, BC

06/07 – 12/15

- Provide Tax-related services including personal tax filing (T-1), business tax (T2) filing, tax advice, and property tax alternatives (if qualified). Small business tax issues. HST, PST, GST & US multi-state sales tax
- Cross border + multi jurisdictional; CA/US, tax issues and strategies for individual's and entities.
- Entity taxation include, small, individual, property, sales, corporate, pass-through, state and local, international, expatriate, transfer pricing, credits and incentives, compensation and benefits, accounting methods, international compliance and planning with prospective consultation on cross border issues

**Tactical Financial Services (Acquired by Manulife)***Director of International Taxation*

Vancouver, BC

12/06 – 12/12

- Provide Tax-related services including personal tax filing (T-1), business tax (T2) filing, tax advice, and property tax alternatives (if qualified). Small business tax issues. HST, PST, GST & US multi-state sales tax
- Cross border; CA/US, tax issues and strategies for individuals. US federal & multi-state income tax.
- Entity taxation include, small, individual, property, sales, corporate, pass-through, state and local, international, expatriate, transfer pricing, credits and incentives, compensation and benefits, accounting methods, R&D tax benefits, prospective consultation on cross border issues
- Management, development, training and mentorship of tax staff and fresh university graduates

**DoveBid, Inc. (Now GoIndustry DoveBid)***Auction Accountant / Tax Manager*

Foster City, CA

10/03 – 09/06

- Sales tax for multiple states and 1 district, PST, GST, and EU VAT taxes.
- Sales Tax summary and detail reports for administrative and governmental use including exclusion and proration. Internal reconciliation, governmental forms, constant contact, mailings, and e-filings
- Caught company up 3+ years in arrears up to date in 8 months
- Escrow reports. Reconciliation of buyers, sellers and 3<sup>rd</sup> party revenue, expenses and fees
- Provincial financial reports for all associated parties transactions from the auction process

**(Acquired by SDM & Associates 06/16)**

**(Acquired by Helin Donovan 01/04)**

**Pohl, McNabola, Berg & Co.**

San Francisco, CA

*Staff Accountant*

12/00 – 09/03

- Significant accounting, audit, & tax experience. From engagement letter through field audit to produce financial statements and report on appropriate federal & state tax forms
- Audits included financial & compliance, reviews, compilations of and closely held S corporations not for profits, trusts and small independent businesses
- Conducted comprehensive financial audits, federal and state compliance audits, and agreed upon procedures including 501c and closely held S corporations
- Perform analytical procedures / analyses to detect unusual financial statement relationships
- Perform various statistical examination and tests for internal controls; TOC, tests of control, and substantive testing; TOT, tests of transactions
- Perform analytical procedures and analyses to detect unusual financial statement relationships
- Identify and communicate accounting and auditing matters to seniors and managers
- Propose adjusting journal entries and discuss audit findings with clients
- Prepare PBC (Provided by Client) lists and confirmation requests
- Prepare SUD (Summary of Unadjusted Differences) to determine if summation of unrecorded adjustments would skew the financials in a particular direction
- Document audit procedures; usually via PPC, create work papers including cross reference and lineage directly from work papers to the drafted financial statements
- Create management representation letter comments and recommendation including cross reference to the appropriate work paper and draft audit report for management review
- Coordinate entrance and exit conferences including discussion of management report and tax preparation
- Financial review and compliance reports, usually in the form of small businesses
- Tax included individual, corporations, partnerships, trusts, not for profits, sales and quarterly
- Prosystem fx, E-audits, e-pace, pro-systems engagement, PPC, Quick Books

**Arthur Andersen**

San Francisco, CA

*Staff Auditor*

07/00 – 11/00

- Sent to St. Charles, IL then Houston, TX on Best Practices Training. Internal processes and procedures.
- Essentially worked on 3 audits in a large corporate fashion. Performed TOCs and audited cash and A/R.
- Minor preparation for upcoming tax season.

## EDUCATION

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**San Francisco State University**, San Francisco, CA

Bachelors of Science: Accounting **01/00**, Finance **08/01**, International business **08/00**, and Banking **05/02**

## ACCREDITATIONS

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EA 111484  
Nexus (US/CA)

CPA (CA 127899 / WA 36452)

CA4 (BC/YK)

## MEMBERSHIPS AND AFFILIATIONS

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NASBA, NATP, NAEA, AICPA, ICABC, VITA / TaxAid

