

Bina Patel  
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(484)-347-2101

#### PROFESSIONAL SUMMARY:

Over 14 years of professional experience in accounting and finance. Business professional with work experience in tax, banking, and accounting fields. Proactive, hands-on and results oriented. Excellent communication skills. Proficient with MS Office, Tax Applications, and other Software.

#### WORK EXPERIENCE:

##### **City of Allentown - Allentown, PA**

##### **Senior Financial Analyst (Jun 2016 to Present)**

- Position Budgeting - developed personnel line item budget activities for salaries, earnings, benefits, and employer-paid taxes.
- Budget - Police and Parks & Recreation Bureau engagement by helping guide them in preparing budget, cost containment, project reporting and processing budget adjustments and transfers.
- Capital reports - quarterly filing and reconciliation of active and reporting of closed capital projects.
- RFP – Partake in the RFP process. Finance support on technical and cost evaluations and supported the team on final oral interviews for selection of the best contractor for the project for the city.
- Bank reconciliation - Ensured timely reconciliations of bank accounts in coordination with the Director's immediate staff.
- Trexler Trust - quarterly filing of capital and operating expenditure reports. Request quarterly reimbursements based on expenses and reconciliation with the funds appropriated. Prepared Trexler Fund budget based on the Trexler Trust fiscal year and aligned the budgeted amounts with the City of Allentown's budget.
- Monthly reports - Assisted in the preparation and analysis of complex financial statements and reports.
- Project Accounting – Project Accounting module setup and initiating capital projects to support parks & recreation and special projects such as COVID-19.
- Property Management – Management of city owned residential rental and commercial rental properties with respect to renovations, rent management, inspections, rental lease agreement and pursuing past due rent via legal route if necessary.
- Payroll – Supported payroll with the pay period processing, year-end W2 and 1099R reconciliations, PMRS audit, pension calculations, Heart & Lung deduction management, AG-385 and Eden information update.
- Travel – Reviewed travel request authorizations and expenditure reimbursement requests.
- Researched and gathered data required for record keeping, reports, and other activities.
- Performed wide variety of related accounting and administrative tasks.
- Ascertained workflows through office efficiently and timely.
- Observed rules and practices on quality of work and personal conduct.
- Provided quality and effective customer service with courtesy and understanding to our customers, citizens, and internal departments.

##### **Senior Tax Examiner, Bureau of Finance Revenue & Audit (Jan 2015 to May 2016)**

##### **Tax Examiner, Bureau of Finance Revenue & Audit (2007 to Dec 2014)**

- Conducted audit of individuals and businesses to ensure compliance with city tax laws and reporting requirements.
- Collected and performed detailed analysis of complex tax documents.
- Initiated proceedings to resolve unpaid or contested bills through the District Court process. Issued notices of violation, prepared, and filed formal complaint/citations (civil & criminal), attended court proceedings and presented arguments and claims against the party, served as public prosecutor in the District Court in cases requiring action. Executed judgments not satisfied in court, including initiating constable sales and or filing liens to record those judgments at the Courthouse.
- Notified taxpayers of delinquency and time in which payment is due. Negotiated arrangements with the taxpayers for payments of tax which included deferred payment plan.
- Reviewed bankruptcy filings and determined amounts to be included in bankruptcy, and prepared detailed list for proof of claim if one is to be filed.
- Worked on assigned cases to collect delinquent taxes, user charges and miscellaneous invoices.
- Updated and maintained accurate tax accounts, including adding, deleting, and changing accounts.
- Participated in the development and implementation of internal procedures and systems to improve and support the collection of delinquent taxes. Conducted research and compiled information from various sources to be used as information for implementing proposed plans.

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- Investigated information and reported unlicensed businesses operating within city limits. Conducted inspections and judged businesses regarding their taxability.
- Prepared and recorded liens for property related items.
- Assisted individuals in explaining tax calculations, billing procedures and preparation of city tax forms.
- Mediated taxpayer complaints and resolved disputes both verbally and in writing concerning nature and amount of taxes owed.
- Worked effectively with other city employees, government officials, professional and non-professional groups, other agencies and jurisdictions and the public.
- Processed payments received by mail or at the counter. Maintained records necessary to track progress of collection efforts.
- Organized training schedules and reported status for new bureau employees.
- Performed wide variety of related accounting and administrative tasks.

**H&R Block (Dec. 2001 to Present) - Allentown, PA**

***Master Tax Advisor & Enrolled Agent***

- Represent taxpayers before the Internal Revenue Service.
- Conducted complete tax interviews for preparing personal tax returns.
- Resolved technical client issues promptly and professionally.
- Prepared federal, state, local and out of state tax returns.
- Researched federal and state tax issues.
- Strategized to determine the best tax solutions for a taxpayer.
- Provided support and trained incoming new tax preparers.
- Answered tax questions and offered advice to assist clients in their financial planning.
- Demonstrated excellent communication skills and ability to foster relationships with clients.

**Prior Experience (Jan 1995 – Aug 1999)**

**Allfirst Bank (Oct 1998 to Aug 1999) - Allentown, PA**

**Aberdeen Proving Ground Federal Credit Union (Mar 1997 to Apr 1998) - Bel Air, MD 21009**

**Wal-Mart (Jul 1993 to Mar 1997) - Abingdon, Maryland**

**Jackson Hewitt Tax Service (Jan 1995 to Apr 1995) - Bel Air, MD 21009**

- Prepared bank deposits, bank reconciliation and worked on collecting accounts receivables.
- Maintained computerized customer account database.
- Performed data entry on daily cash pools.
- Analyzed and tested of input/output data processing.
- Used computerized accounting for the accounting office.
- Provided guidance to clients on tax related issues and assisted in financial planning and setting financial goals.
- Prepared federal and state income tax returns for clients.

**EDUCATION:**

**Enrolled Agent (EA)**

Federally authorized tax practitioner represents taxpayers before the Internal Revenue Service (IRS)

Annually Completed 30 certification hours of courses

Certified course in Auditing, Ethics, Corporations, Partnership, and Individual Income Tax Return Preparation

**Lehigh Carbon Community College - Schnecksville, PA**

Accounting Program

Principals of Accounting, Financial Accounting, Cost Accounting, Intermediate Accounting, Managerial Accounting

**Bernard M. Baruch College, New York, NY**

Bachelor of Business Administration (BBA)

Major - Information systems      Minor - Statistics

**Silicon Training Institute - Edison, NJ**

Diploma in Client/Server Programming

**Universal Accounting Center - San Diego, CA**

Certificate course in Accounting and Bookkeeping