

THOMAS A BOLING
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SUMMARY OF QUALIFICATIONS

More than 15 years corporate experience in multiple diverse financial service roles with a proven record of productivity, quality and integrity.

- Experienced in communicating with people of all ages and backgrounds.
- Strong organizational and time management skills.
- Skilled in account reconciliation and examination
- Strong written and verbal communication skills.
- Highly analytical with great problem-solving abilities and a sense of urgency.
- Ability to serve as a liaison between internal departments and other operating units.

PROFESSIONAL EXPERIENCE

INTERNAL REVENUE SERVICE TAX EXAMINER

**Kansas City, MO
2018 – Present**

- Examined individual taxpayer returns in Error Resolution Unit to ensure accurate reporting and tax law compliance.
- Updated and verified accuracy of calculations and flagged non-compliant returns for further internal department review.

STATE STREET CORPORATION AIS TAX ASSOCIATE 2

**Kansas City, MO
2015 – 2017**

- Prepared tax allocations for hedge fund clients on a monthly and/or yearly basis.
- Calculated taxable income from underlying partnership investments.
- Assigned new client hedge fund with tax work 5 months behind performing needed updates and saving approximately 120 prime work hours during tax season.
- Documented in at least 15 e-mails fund specific details and history necessary to ensure seamless fund transfer between department employees. Overall time spent reduction estimated to be 10%.
- Significantly improved personal productivity by at least 10% creating and utilizing fund specific notes for various required hedge fund functions.
- Collaborated with internal Net Asset Valuation groups to reduce time spent by 15% on monthly Profit & Loss to Trial Balance reconciliation work for hedge fund clients.

IIS ACCOUNTING ASSOCIATE 1

2013 – 2015

- Communicated with mutual funds to obtain documentation required for monthly pricing.
- For 90 assigned Taft Hartley clients, met the 99.9% corporate audit accuracy standard.
- Covered 120 internal fund audits during first month of employment due to staff shortage. Corporate departmental workload expectation for new employee ranged from 70 to 80 monthly fund audits on average.
- For transactions more than \$5,000 USD, conducted daily review and follow-up eliminating aged open items from Senior Management weekly exception report which met the 100% weekly requirement.

IIS CUSTODY ASSOCIATE 1**2013 – 2013**

- Processed daily client directives for non-profit entities including capital calls, investment management fee payments, trade funding and currency exchanges.
- Effectively utilized MCH, Instruct, Cash Sweep and Cash Payments cash processing systems for over 50 financial transactions daily achieving 100% error free process rate.

**RELIABLE MECHANICAL SERVICES INC
HVAC/R TECHNICIAN****Kearney, MO
2012 – 2013**

- Participated in servicing of residential and commercial heating/cooling, refrigeration and food service equipment Kansas City metro-wide.
- Averaged 3 to 5 service calls daily to local restaurants, schools and other businesses needing mechanical services or parts deliveries.
- Effectively communicated with customers by providing detailed written service tickets.
- Received numerous client recommendations resulting in retention of existing customer contracts.

**LOUIS DREYFUS COMMODITIES
SETTLEMENT CLERK****Kansas City, MO
2008 – 2010**

- Using Great Plains accounting software, produced on average 30 daily invoices for Ethanol/Biodiesel fuel shipments.
- Worked with Merchandisers and their assistants to ensure all shipping documents and other associated information correct prior to invoicing.
- Complied with EPA regulations by effectively recording and transmitting RIN (Renewable Identification Numbers) associated with rail and truck fuel transfers.
- Monitored and followed up on customer Accounts Receivable files to verify payment status.

**DST SYSTEMS, INC.
SENIOR ACCOUNT LIAISON****Kansas City, MO
2003 – 2008**

- Responsible for balancing, reconciling and executing corporate state tax withholding processing.
- Over single year, designed, tested and implemented procedures required to automate daily state tax withholding data file feeds.
- Introduced Access database for real-time processing activity providing accurate and consistent results for 42 state entities reducing daily processing duties by 50%.
- Took initiative to automate state withholding tax remittance for approximately 15 additional state revenue departments resulting in an increase of 35% from paper to electronic submission eliminating errors and lost time.

EDUCATION**University of Missouri – Kansas City - 1992
Business Administration****Metropolitan Community College – 1981
Business**