RYAN SHEPPARD, CPA

TAX MANAGER

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PROFILE

Authentic and inclusive leader with sophisticated level of knowledge of public accounting, tax compliance, and tax reporting. Experience at PwC tax practice for asset and wealth management and EisnerAmper tax practice for financial services. Can navigate the most complex tax issues and discuss in clear, understandable terms. Engaging and personable work style for leading teams and interfacing effectively with staff, business partners, auditors, tax agents, clientele, and senior leaders. High level of intellectual curiosity and a growth mindset. Proficient in Microsoft Excel, Thomson Reuters GoSystem, Bloomberg SuperForm, online research services, and other digital and automated tools.

AREAS OF EXPERTISE

- Public Accounting (CPA)
- Tax Law
- Tax Preparation
- Financial Statements
- Compliance & Legislature
- Consulting Experience
- Tax Reporting
- Income Tax
- S Corporation
- Excel

EDUCATION & CREDENTIALS

Certified Public Accountant

Binghamton University, State University of New York, Binghamton, NY

- **M.S.** in Accounting/Taxation, 2017
- **B.S.** in Accounting, 2016
- **B.A.** in Geography, 2016
- *Graduated Cum Laude, Dean's List*

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PROFESSIONAL EXPERIENCE

Tax Manager – Financial Services 8/2023 to Present
Eisner Advisory Group LLC, New York, NY

Provided full service federal, state and local, and international tax compliance services to a variety of hedge fund, private equity, venture capital, and fund-of-fund clients while managing a team of professionals that assisted in delivering that service.

- Counseled numerous investment management clients on their tax obligations and compliance requirements across various jurisdictions and entity types, while reviewing a variety of tax deliverables thoroughly.
- Directed a team of tax professionals through the intricacies of partnership and corporate tax compliance while staying on track for client deliverable deadlines.
- Oversaw a variety of engagement metrics including realization, profitability, utilization, and collections on an ongoing basis, and adjusted the engagement workflow accordingly to meet those targets.
- Conducted extensive trainings to staff and seniors in the firm on complex topics such as management company/private equity/hedge fund tax concepts.

Tax Senior – Financial Services 2/2022 to 7/2023
Eisner Advisory Group LLC, New York, NY

Reviewed and provided high quality tax workpapers, Schedule K-1s, tax returns, and other client deliverables to a variety of alternative investment clients including private equity funds and fund-of-funds.

- Created a variety of new Excel workpaper templates used throughout the firm for various management company entities and fund-of-fund clients, while delivering client tax returns and K-1s timely.
- Taught fellow staff and seniors a wealth of partnership tax concepts through weekly, monthly, and ad-hoc firm trainings.
- Developed a new proprietary firm K-1 generation software as part of a team and advanced various tax technical firm initiatives such as new Schedule K-1 footnote reporting, schedule management, and software implementation.
- Organized various firm events such as celebratory get togethers and conference social gatherings as part of firm camaraderie initiatives.

Senior Tax Associate – Asset & Wealth Management 1/2020 to 7/2021
PricewaterhouseCoopers, LLP, New York, NY

Manage tax risk and ensure compliance for large Regulated Investment Companies (RIC), retail mutual funds, hedge funds, fund-of-funds, and

Exchange Traded Funds, – consulting directly with clients on operational risk issues and tax implications.

- Advised clients and asset managers on their federal, state, and international tax responsibilities, in the current global market context of increased scrutiny by tax authorities.
- Led various hedge fund and RIC tax compliance engagements from preparing engagement letters and creating an engagement plan to performing ad-hoc client requests and coordinating tax deliverables whereby ensuring excellent service.
- Interpreted tax law changes related to tax filing responsibilities, domestic and international tax reporting, and communications with federal and state taxing authorities.
- Prepared federal and state income tax returns, including Forms 1042-S, 1065, 1120, 1120S, 1120-RIC, 5471, and 8613, extensions and various other filings.
- Served as a strong and encouraging mentor to interns and junior staff; delivered training in tax regulations and technical applications.

Tax Associate – Asset & Wealth Management 1/2018 to 12/2019
PricewaterhouseCoopers, LLP, New York, NY

Performed diversified accounting, auditing, and tax assignments for Asset & Wealth Management clients while building strong knowledge of partnership tax analysis and compliance.

- Produced a high volume of work papers including fiscal year reporting, excise tax, shareholder reporting, book to tax calculations, and Schedule K-1 preparation templates.
- Engaged independent auditors and facilitated year-end tax audit and preparation of tax footnote for financial statements and SEC board reporting.
- Trained new employees on various Microsoft Excel functions, fund structures, and partnership tax concepts.

PROFESSIONAL EXPERIENCE, CONTINUED

Graduate Teaching Assistant 6/2018 to 7/2021

Binghamton University, School of Management, Binghamton, NY

Produced course material in collaboration with course instructor for "Introduction to Asset Management & Taxation of Financial Products" graduate-level course for students pursuing a Master's Degree in Taxation.

- Delivered lectures about asset and wealth management taxation while explaining real-world practices from PwC work.
- Challenged students to stretch their knowledge, ask questions, and actively engage in class discussions.
- Graded exams, evaluated projects, and served as mentor for graduate students seeking to learn more about the field.

Asset & Wealth Management Tax Intern 6/2016 to 8/2016

PricewaterhouseCoopers, LLP, New York, NY

Joined PwC as a summer intern and was assigned work regarding a large private equity client of high repute.

- Built a foundational working knowledge of asset management tax concepts in practice.
- Prepared workpapers and tax forms, in addition to taking on special compliance-related projects.
- Helped the firm launch and market a new private equity tax plan.

TECHNICAL SKILLS

- Microsoft Office (Word, Excel, PowerPoint, Outlook)
- Thomson Reuters GoSystem
- Bloomberg SuperForm Tax
- Alteryx
- ArcGIS Suite

AFFILIATIONS & MEMBERSHIPS

- Certified Public Accountant, Member - AICPA
- Member, Beta Alpha Psi & Gamma Theta Upsilon
- Outstanding Student in Accounting Award, The New York State Society of CPAs (NYSSCPA)