James Lavala, CPA
Tax Analyst
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www.linkedin.com/in/james-lavala-cpa-093b88140

PROFESSIONAL SUMMARY: Tax consultant and CPA with extensive experience supporting commercial clients, CPA firms, and individual taxpayers through tax research, compliance, review, advisory, and financial analysis services. Strong expertise in individual and business taxation including Partnerships, S-Corporations, C-Corporations, Estates, Trusts, Non-Profits, and High Net Worth Individuals. Experienced utilizing AI-assisted research tools including ChatGPT and Claude AI along with enterprise tax software platforms to analyze, review, and resolve complex tax matters.

CORE COMPETENCIES: Business Tax • Individual Tax • Tax Research • Tax Compliance • Tax Advisory • Multi-State Tax • High Net Worth Taxation • Corporate Tax • Partnership Tax • AI-Assisted Tax Research • ChatGPT • Claude AI • Financial Analysis • Tax Software • Tax Review • IRS Reporting • CPA Firm Support • Audit & Compliance

PROFESSIONAL EXPERIENCE

BUSINESS PROCESS ADVISORY, New York, NY January 2008 – Present
Tax Consultant

- Work independently and in conjunction with accounting firms, CPA firms, and private organizations in a consultative tax and business advisory capacity
- Process financial analysis, accounting review, tax compliance, audit support, and operational consulting engagements for individuals and businesses
- Audit transaction history, financial records, management controls, and tax reporting documentation to support compliance and reporting accuracy
- Monitor business developments and organizational procedures to ensure compliance with governmental and corporate operational standards
- Perform review of business standards and operating procedures while supporting workflow improvement initiatives
- Utilize AI-assisted tools including ChatGPT, Claude AI, and Intuit internal AI systems to research tax issues and improve workflow efficiency

Intuit – Business | January 2025 – May 2025

- Functioned as part of the Intuit Expert Network supporting small and mid-sized business clients.
- Utilized Intuit internal AI research systems along with ChatGPT and Claude AI to analyze client tax situations, identify reporting issues, and resolve customer inquiries.
- Provided tax advisory support involving Partnerships, S-Corps, C-Corps, Estates, Trusts, and High Net Worth clients.
- Researched and analyzed complex tax matters involving investments, foreign income, ESPPs, rental activity, and multi-state reporting.
- Assisted clients with Schedule C reporting and business income classification.
- Completed Intuit Tax Level I & II training and advanced coursework involving complex tax scenarios.

JDA | January 2023 – April 2025

- Worked with Intuit commercial clients providing tax advice, research, and compliance support.
- Utilized AI-assisted tax research tools including ChatGPT and Claude AI along with internal databases to review client filings and resolve tax-related issues.

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- Reviewed financial records and supporting documentation for reporting accuracy and compliance consistency.
- Assisted with federal and state tax research related to business entity taxation and reporting requirements.

TaxFyle | January 2023 – April 2025

- Worked with regional and mid-sized CPA firms reviewing and processing tax returns for High Net Worth Individuals, S-Corps, and C-Corps.
- Conducted tax review procedures, financial analysis, and reconciliation of client financial documentation.
- Assisted with preparation and review of complex individual and business tax returns.
- Utilized AI-assisted analytical tools including ChatGPT and Claude AI to support tax research, workflow efficiency, and reporting analysis.

TAX SOFTWARE

CCH Tax (Individual & Business) • Lacerte • SurePrep • ProConnect • UltraTax • Intuit Tax Platforms • ChatGPT • Claude AI • Microsoft Excel

ADDITIONAL PROFESSIONAL EXPERIENCE

KPMG — Internal Audit Consultant (JPMorgan Chase)

- Reviewed governance, compliance, and operational controls documentation.
- Performed issue validation and audit remediation review procedures.

MAHONEY COHEN & COMPANY, CPA, PC — Internal Audit Consultant

- Managed SOX 404 testing and internal control documentation review.
- Conducted operational and financial reporting audits.

ERNST & YOUNG, LLP — Internal/External Auditor

- Performed SOX 404 testing and substantive audit procedures for Fortune 500 clients.
- Conducted financial analysis and accounting research support.

PRICEWATERHOUSECOOPERS (PWC) — Property Tax Associate

- Conducted property tax research and advisory support for commercial clients.
- Assisted with property tax compliance and consulting engagements.

Marriott International — Property Tax Accountant / Internal Audit

- Audited internal and external property tax records for compliance with corporate accounting procedures.
- Performed reconciliation analysis and analytical review of accrual account balances and tax assessments.

EDUCATION & CERTIFICATIONS: University of Rio Grande — Accounting, Licensed CPA (Maryland), Passed 2 Parts of CIA Certification, Intuit Tax Level I & II Certifications