James Lavala, CPA
Data Analyst/Customer Liaison
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PROFESSIONAL SUMMARY: Data analyst and operations professional with extensive experience analyzing financial, operational, customer, and compliance-related data. Experienced utilizing AI-assisted tools including ChatGPT and Claude AI along with AI-powered development platforms to improve workflows, conduct advanced research, build business applications, and streamline reporting processes. Strong analytical background combined with business process improvement, database management, and technology integration expertise.

CORE COMPETENCIES: Data Analysis • AI Integration • ChatGPT • Claude AI • Data Visualization • Reporting & Analytics • Financial Data Analysis • Data Validation • Database Management • Business Intelligence • Workflow Optimization • AI Web & App Builders • Excel Modeling • Research & Analysis • Process Automation • Quality Assurance • CPA Knowledge Base

PROFESSIONAL EXPERIENCE

BUSINESS PROCESS ADVISORY — New York, NY

Data Analyst / AI Operations Specialist
January 2008 – Present

Intuit – Business | January 2025 – May 2025

- Analyzed customer tax and financial datasets for Partnerships, S-Corps, and C-Corps using Intuit systems and AI-assisted research tools.
- Leveraged Intuit internal AI platforms along with ChatGPT and Claude AI to research, analyze, and resolve complex customer issues and reporting discrepancies.
- Reviewed financial records and business datasets to identify data inconsistencies and reporting errors.
- Generated analytical summaries and operational reports supporting workflow improvement initiatives.
- Assisted with AI-enhanced knowledge retrieval and customer case analysis for complex tax scenarios.

JDA | January 2023 – April 2025

- Worked with commercial client datasets supporting financial analysis, reporting validation, and operational workflow review.
- Utilized AI-assisted research and analytical tools including ChatGPT and Claude AI to improve processing accuracy and client issue resolution.
- Performed reconciliation and validation of customer financial information across multiple systems and reporting environments.
- Supported management reporting through data analysis and trend identification.

TaxFyle | January 2023 – April 2025

- Reviewed and analyzed tax-related financial datasets for High Net Worth Individuals, S-Corps, and C-Corps.
- Conducted data cleansing, quality assurance review, and reconciliation procedures for CPA firm engagements.
- Generated reporting summaries and workflow tracking documentation to improve operational efficiency using AI-assisted analytical tools.

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AI & DIGITAL DEVELOPMENT PROJECTS

Independent AI Integration & App Development Projects

- Utilized AI-powered web and application builders including Famous.ai, Base44, and Lovable to build business applications, landing pages, operational dashboards, and AI-assisted workflow tools.
- Developed AI-enhanced business concepts including budgeting platforms, marketing dashboards, reporting tools, and customer engagement applications.
- Integrated AI-generated workflows, automation tools, ChatGPT, and Claude AI into application development and operational business processes.
- Worked with AI-assisted design and deployment tools to streamline app creation and operational scalability.

TOWER LEGAL SOLUTIONS — New York, NY

Consultant (Legal Review Analyst)
December 2018 – February 2019

- Reviewed legal records and large-volume datasets for compliance accuracy and reporting consistency.
- Conducted quality control analysis and database validation procedures.
- Created updated data files and maintained database integrity for client reporting systems.
- Identified operational discrepancies and communicated analytical findings to management teams.
- Utilized ChatGPT and Claude AI to assist with analytical workflow review, quality control support, and process efficiency initiatives.

ADDITIONAL EXPERIENCE

- Internal Audit & SOX Compliance
- Financial Reporting & Analysis
- Business Process Review
- Treasury Reconciliation & Operational Audit

TECHNICAL SKILLS

Advanced Excel • AI Research Tools • ChatGPT • Claude AI • Intuit Systems • Database Applications • Financial Reporting Tools • Microsoft Office Suite • CRM Platforms • AI App Builders • Data Validation & Reporting Systems

EDUCATION & CERTIFICATIONS

University of Rio Grande — Accounting
Licensed CPA (Maryland)
Intuit Tax Level I & II Certifications