

Nicole Zhao, CPA, MST

EXPERIENCE

MaloneBailey, LLP

2018 - present

Tax Partner

- Oversee and manage tax service offering
- Responsible for managing and developing client relationships
- Act as a strategic business advisor to all clients
- Actively represent the firm in the business community

Calvetti Ferguson

2015 – 2018

Tax Manager

- Review federal and state tax returns for corporations, partnerships and individuals
- Review consolidated tax returns
- Review information returns for international clients
- Review tax provision (ASC 740) and coordinate with Audit Department on adjustments
- Conduct tax research using Checkpoint RIA and CCH IntelliConnect
- Provide tax planning and consulting services; identify tax saving opportunities
- Assist client with M&A transaction tax planning and tax calculation
- Represent client in front of IRS and state authorities
- Specialized in Oil and Gas taxation
- Manage various tax projects to ensure timely compliance
- Conduct technical training and software training
- Develop and mentor seniors and associates to help them meet their career goals

Petronovich Pugh & Company, LLP

2013

Staff Accountant

- Prepared federal and state tax returns for corporations, partnerships, individuals and trusts
- Prepared information returns for international clients
- Prepared tax provision (ASC 740) and adjustment
- Compiled financial statements and prepare required disclosure

Sagent Management

2012

Tax Associate

- Prepared federal and state tax returns for corporations, partnerships and individuals
- Performed multi-states apportionment and allocation calculation
- Conducted tax research with RIA Checkpoint

PricewaterhouseCoopers China, Guangzhou Branch

2008-2010

Audit Associate

- Participated in audit planning, performed initial tax assessment and risk assessment, conducted tests of internal controls and substantive procedures; prepared audit reports and notes to accounts
- Audit clients included numerous public companies and multi-national companies
- Received highest rating in annual performance evaluation at PwC Guangzhou for FY09

EDUCATION

San Jose State University

San Jose, California

- Master of Science in Taxation (2012)

Sun Yat-sen University

Guangzhou, China

- Bachelor of Science in Accounting (2008)

PROFESSIONAL ACCREDITATION/ORGANIZATIONS

- Certified Public Accountant, Texas and California
- Member
 - Greater Houston Partnership
 - Asian Chamber of Commerce
 - Texas Society of Certified Public Accountants