John (Jack) J. Walsh III, CPA

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Education

University of Notre Dame, Mendoza College of Business South Bend, IN
Master of Business Administration, Finance Major May 2024

- Earned MBA Fellowship
- 3.86 GPA
- Selected to Applied Investment Management course

University of Maryland, Robert H. Smith School of Business College Park, MD
Bachelor of Science, Accounting & Finance Major (Dual Degree) May 2015

Experience

PricewaterhouseCoopers LLP *(Tax Practice)* New York, NY
Senior Manager - Trust Solutions: Banking & Capital Markets 2022-2023

- Tailored solutions and services to sell new and existing clients designed to help meet the evolving needs of companies within the banking and capital markets industries
- Guided 30+ countries with project management assisting 200+ global employees with management tasks in delivering scalable service solutions to clients
- Developed and proposed technology-based automation designed to decrease budgeted spend on client work by 25%
- Coordinated with specialist teams to consult clients with financial analysis and forecasting for future effects of potential tax law changes

Tax Manager - Trust Solutions: Banking & Capital Markets 2020-2022

- Managed 10+ person engagement teams in high-pressure environments, including business combinations and acquisitions, and new tax lax enactments
- Collaborated with specialist teams in providing clients with personalized services and solutions to meet their complex needs
- Created analytical procedures to assist in the verification of accuracy and consistency of financial statement information
- Oversaw billing and invoicing for large engagement teams to help Partners exceed billing benchmarks set forth by PwC

Tax Senior Associate - Banking, Capital Markets & Insurance 2018-2020

- Supervised eight teams on multiple projects, delegating tasks to 10+ staff members to ensure timely completion of engagements
- Analyzed financial statements to perform income tax provision audits for international publicly traded companies
- Reviewed and interpreted complex partnership and corporation structures and agreements including NAV schedules and tax carry provisions

Tax Associate - Banking, Capital Markets & Insurance 2015-2018

- Prepared tax compliance forms for 10+ Banking, Capital Markets, and Insurance clients, with exposure to research and analysis of tax laws and regulations

Achievements

- Certified Public Account (CPA) licensed in the State of New York /American Institute of Certified Public Accountants (AICPA) and Member of New York Society of CPAs
- Proficient in Alteryx and Tableau