

Newton Kemp Maer III

540 Enterprise Blvd, Bozeman, MT 59718

Areas of Expertise

- Tax
- Audit
- Financial Statement Compilation

Industries

- Various (small businesses)

Special Skills & Traits

- Proactive at building relationships with clients and peer to peer environment.
- Adept at working in a team or independently.
- Experienced organizational and time management skills.
- Knowledgeable in Auditing & Accounting – methodology, procedures, internal controls and GAAP, and communicating these results in organized and accurate financial reports.
- Experienced with communicating tax fiduciary results and research queries in a factual and organized manner.
- Active engagement results driven individual.

Technology

- Wolters Kluwer CCH Pro System FX tax software
- Lacerte Tax Software
- Ultratix Software
- QuickBooks Software
- PDF Software
- Microsoft Office Products
- Paperless environment software

Contact information:

nkmaer@yahoo.com and/or my mobile number (text or call) 406-451-5140

Professional skills include tax, external and internal audit procedures, GAAP accounting, and general accounting for business entities. I am actively pursuing a CPA license with career goals in tax, audit, & accounting with a public accounting firm or privately funded entity.

Professional Accomplishments:

- Prepare and review high net-worth individual returns. Prepare and review C-corp, S-Corp and partnership returns for small to medium sized entities.
- Manage client tax liability issues on their behalf and contact the IRS to resolve tax issues in a timely manner.
- Prepare Federal Form 990, for non-profits and home-owner associations (HOAs).
- Prepare federal and state payroll reports for small businesses and individuals. Prepare franchise forms (Texas) and state unemployment forms (TX and MT) for small businesses.
- Assist management with special projects, answer taxpayer questions via phone and/or email. Meet with clients to discuss tax planning in conjunction with preparation of tax return.
- Analysis and preparation of balance sheet, income statement, and cash flow statement for client compilation services (not expressing an opinion).
- Assist audit engagements with planning, testing, analysis of internal controls and preparation of audit reports (expressing an opinion) for the client.
- Perform inventory observations (testing) to assist management with fiscal year-end counts.
- Assist management with company merger processes and procedures, which include transitioning paper files to paperless files, utilizing paperless software to organize files on a server and physical transition procedures.
- Achievements: Assist with audit, tax, accounting and other special project engagements which are completed according to the client schedule and Firm management agreement. Production goals during tax season include a completion range of over 100 tax returns and ½ of that range during the extension period. Most small business and non-profit audit engagements ranged from fifteen to twenty engagements per year, usually occurring outside of tax season. An aggregation of approximately 2,400 hours in the office was completed each year, including overtime hours. Realization rates are based on an hourly rate and three to four times the hourly rate. Details of the realization reports are discussed in an annual review with the company.

Professional Experience (most recent and relevant)

- Nov 2024 to Apr 2025 Monteith Wealth LLC (seasonal), MT Investment & Tax
- July 2023 to Aug 2024 JCCS CPA, MT CPA firm
- June 2022 to June 2023 Schafer and Co PLLC (merged with JCCS), MT CPA firm
- Jan 2021 to Jan 2022 Holmes and Turner, MT CPA firm
- Feb 2017 to Dec 2020 O'Neal & Holmes LLP, TX CPA firm

Education/Certifications

BBA, Accounting West Texas A&M University