

Stephen Tate, CPA, MBA

PERSONAL HIGHLIGHTS

- Certified Public Accountant in South Carolina
- Continuously adapts and overcomes tax law changes and reporting requirements
- Multiple students under my training have been recognized for their personal level of knowledge

College Professor Experience

Visiting Professor of Business at Charleston Southern University

- Assisted in building the first accounting society on campus
- Assisted in planning the first accounting day for students to be recruited by national firms
- Assisted in developing a plan to double accounting major enrolment in next three academic years

Accounting Experience

Family Office Tax Accountant

- Assisted in completing complex 1065 and 1120S tax returns
- Advised owners on the benefits of electing various state passthrough entity elective taxes
- Conducted research projects and presented information to assist owners in making informed tax decisions
- Made recommendations for multistate filing requirements based on various states allocation and apportionment requirements

Tax Associate at Dixon Hughes Goodman

- Led office training on BNA Fixed Asset software
- Skilled at generating tax research charts using multiple websites
- Proficient with the following tax software: CCH Access, CCH Engagement, CaseWare, GoFileRoom, BNA Fixed Assets
- Learned how to create: trial balances from check stubs, bank reconciliations, general ledgers in QuickBooks
- Familiar with tax return process from client information gathering until completion of return for: 1120, 1120F 1120S, 1065, 1040, 1040NR
- Focus on large corporations that file in multiple states which require complex accounting adjustments
- Significant experience with net operating losses and tax planning situations
- Passed all four portions of the CPA exam on the first attempt

United States Navy Experience

Nuclear Reactor Operator on Submarines

- Responsible for safe operations of critical nuclear reactors
- Maintained electronic equipment that ensured nuclear reactor safety

EDUCATION

MBA

Charleston Southern University Charleston, SC

- Awarded most Outstanding MBA Student

BBA in Accounting

Charleston Southern University Charleston, SC

- Member of honor society Alpha Chi
- Member of honor society Sigma Beta Delta

BS in Applied Science and Nuclear Technology

Thomas Edison State College Trenton, NJ

- Graduated with honors receiving the Vice President Award

WORK HISTORY

Charleston Southern University Visiting Professor of Business: Start Date January 6th 2023 Current Position

Family Office Tax Accountant: Start Date: September 20th 2021 Completion Date August 31st 2022

Dixon Hughes Goodman Tax Associate: Start Date January 6th 2020 Completion Date September 15th 2021

Dixon Hughes Goodman Tax Internship: Start Date January 7th, 2019 Completion Date May 27th 2019

Honda of America Mfg.: Start date August 26th, 2013 Completion Date September 1st, 2017

United States Navy: Start Date April 7th, 2003 Completion Date April 23rd, 2013