

KACY T. RAMSEY

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CAREER TARGET: INVESTMENT BANKING EXECUTIVE

Well qualified to leverage extensive industry knowledge, skills, and experience in transaction-oriented position within structured finance and/or investment banking environments. Offer broad organizational perspective and results-driven approach to activities and projects.

More than 17 years of experience within the banking industry, with focus on international banking. Extensive knowledge of complex financial structures and products within debt and capital markets. Strong quantitative and analytical skill sets. Establish and maintain effective relationships with direct reports, senior management, and professional consultants. In-depth background in evaluating highly detailed transaction documents and agreements. MBA degree from XXXXXXX Business School.

Core Knowledge & Skill Areas:

Structured Financial Transactions	Asset Management	Mergers & Acquisitions
Advanced Corporate Finance	Equity & Credit Derivatives	Tax Exposure/Risk Management
International Banking & Business	Loan Workouts & Foreclosures	Private Placement Memorandums
Cross-Functional Team Leadership	Bankruptcy Workouts	Offering Memorandum

PROFESSIONAL EXPERIENCE

XXXXXXXXX INVESTMENT BANK, City, XX, 19XX– Present

Director/Tax Manager (20XX – Present) ■ **Vice President II** (20XX – 20XX)

Vice President I (19XX – 20XX) ■ **Assistant Vice President** (19XX – 19XX)

Earned fast-track promotions through increasingly responsible executive positions. Currently oversee Tax Department within Financial Division of company's U.S. operations, as well as subsidiaries in Latin America, Canada, and the U.S., managing team of 6 and reporting to managing/tax director for North and South Americas. Provide tax and financial structuring recommendations for bank's investments in capital markets transactions, private equity/real estate funds, and commercial banking transactions.

Value Offering: Played key role in driving and shaping critical strategies and processes during pivotal times and through multiple changes in leadership. Facilitated \$200 million reduction in total liabilities on 2 separate projects. Participated in new business initiatives and helped organization increase its capacity to launch new financial products.

Selected Accomplishments:

Latin America Reorganization

- *Context/Challenge:* Reorganized and scaled back XXXXX's business operations, including sale of banking operations in Latin America following bankruptcy workout. Coordinated tax-efficient reorganization while preserving extensive Latin American client network.
- *Actions:* Spearheaded cross-disciplinary efforts within Latin America bank, as well as with local tax counsel in Argentina, Brazil, Chile, Mexico, and Venezuela. Quantified and presented potential financial and tax results for each proposed solution to senior management.
- *Results:* Maintained Latin American client network for company, achieving goals with minimal tax consequences by implementing representative offices and small service companies.

XXXXXX/XXXXXX Merger

- *Context/Challenge:* Played key role in creating much-needed synergies by merging corporate and investment banking operations/assets prior to acquisition of XXXXXX. Headed efforts that identified most tax-efficient manner for merger initiative.
- *Actions:* Coordinated efforts with French tax colleagues to ensure compatibility of U.S. with French tax solutions. Led efforts of law and accounting firms in developing solution. Created financial models for various merger scenarios and presented to upper management in France and U.S.
- *Results:* Helped achieve tax-free merger that saved company \$125 million in U.S. liabilities.

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IRS Voluntary Compliance Program

- *Context/Challenges:* Identified compliance gaps (U.S. Information Reporting and Withholding) totaling \$98 million in potential U.S. tax withholding liabilities. Tasked with fixing compliance gaps within 2 months, including securing buy-in from colleagues and clients.
- *Actions:* Educated senior management and investment bankers on technical tax concepts and the need for tax documentation. Reviewed transaction documents to identify exemptions. Drafted and submitted final self-audit report to the IRS.
- *Results:* Reduced initial tax liability from \$98 million to \$350,000.

XXXXXX BANK, City, ST, 19XX – 19XX

Assistant Vice President / U.S. Tax Manager (19XX)

Assistant Vice President (19XX) ■ Tax Associate (19XX – 19XX)

Managed filing of U.S. income tax returns, ongoing tax examinations, and U.S. information reporting requirements, providing tax research and recommendations on transactional basis for commercial bankers. Supervised teams of up to 9 in daily activities and special projects.

Value Offering: Contributed to development and implementation of tax strategies that improved operations and competitive advantage in the U.S. for Japanese bank.

Selected Accomplishments:

Operations Reengineering

- *Context/Challenges:* Right-sized fragmented Tax Department that was suffering from absence of technical and managerial leadership.
- *Actions:* Implemented streamlined process for preparation and filing of bank’s U.S. tax compliance, including close supervision and development of team members. Established improved lines of communication with bankers.
- *Results:* Strengthened ability of Tax Department to support business units, subsequently generating improvements in competitive market advantage.

IRS Audit Management

- *Context:* Countered IRS deductibility challenge of approximately \$500 million in loan loss deductions covering 3-year period and several tax issues.
- *Actions:* Supervised team of 9 in reviewing loan documentation for 10 previous years in order to support tax analysis. Negotiated extensively with IRS agents.
- *Results:* Managed completion of IRS audit that resulted in \$70 million refund.

XXXXXXXX, City, ST, 19XX – 19XX

Supervising Senior Tax Specialist (19XX – 19XX) ■ Senior Tax Specialist (19XX – 19XX)

Tax Specialist (19XX – 19XX) ■ Assistant Tax Specialist (19XX – 19XX)

Prepared and reviewed U.S. corporate and individual income tax returns for Japanese clients, with emphasis on Japanese financial institutions. Managed tax exams and assisted in seminar coordination.

EDUCATION

Master of Business Administration in Finance, 20XX – XXXXX BUSINESS SCHOOL, City, ST

Master of Science in Taxation, 19XX – XXXXXXXX UNIVERSITY, City, ST

Bachelor of Arts in Economics, 19XX – UNIVERSITY OF XXXXXXXX, City, ST