

# David E. Jones

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(440) 298-124

Thompson, Ohio

## Senior Tax Executive

Senior level tax executive with experience as a global leader of a Big Four public accounting expatriate tax consulting and compliance practice for seven years serving Fortune 500 companies. Tax leader for three geographic regions of the US covering 5 states, 3 states and Florida, respectively, for 10 years. Proven ability to hire, recruit, retain personnel, grow and maximize profits of the tax practice, implement strategic and tactical Firm initiatives, budgeting, productivity improvements, software development and implementation. Strong leadership and management skills including general management, marketing, sales and staff development such as women's and minority initiatives.

## Professional Experience

*Slippery Rock University*

*Slippery Rock, PA*

*August 2009- May 2010*

### **Instructor, Accounting**

Responsible for teaching 2 accounting, tax, auditing courses per semester.

*AACSB Bridge Program Graduate*

*June 2009*

*Self Employed*

*Thompson, Ohio*

*May 2007 - Present*

*SS&G Financial Services, Inc.*

*Solon, Ohio*

*Jan 2006 – May 2007*

### **Tax leader Solon Office**

Responsible for all tax consulting and compliance of a 35 person tax department serving entrepreneurs, individuals, estates and trusts. Tax client service executive for Firm clients for companies in the manufacturing, service and real estate industries including individual clients with significant income and net worth. Also, one of three members of a tax executive committee responsible for the tax practice of all locations of SS&G Financial Services, Inc.

*Ernst & Young, LLP*

*Cleveland, Ohio*

*Oct 2000 – Sept. 2006*

### **Global Mobility Markets Leader, US Tax Leader and Global Co-CEO**

Responsible for all expatriate tax consulting and compliance functions in the US tax practice, sales and marketing leader for all global expatriate tax consulting and compliance engagements, Co-CEO of the global expatriate tax practice responsible for all tax functions on a global basis. Global leader for over 1800 tax professionals world-wide and \$350M in revenues.

### **Major Accomplishments**

- Developed and implemented a world-wide software system for managing expatriate tax clients
- Implemented a tax outsourcing office in Bangalore, India
- Had a win rate of 50% of major expatriate tax programs changing service providers
- Led the team that won the IBM expatriate tax engagement, one of the world's largest programs

*Ernst & Young, LLP*

*Cleveland, Ohio*

*Feb 1996 – Oct 2000*

### **Tax Managing Partner Lake Erie Area**

Responsible for all tax functions of a nine office, five state (Michigan, Ohio, W. New York, W. Pennsylvania, West Virginia) tax practice including over 600 tax professionals and over \$100M in revenues. Served on the Lake Erie Area Executive Committee.

#### Major Accomplishments

- Increased revenue approximately 10% on average every year and profitability 8% per year.
- Served Fortune 500 clients like: TRW, and Sherwin-Williams
- Implemented a variety of strategic firm initiatives like: compliance mega-processes, and consulting specialization
- National Tax Compliance Advisory Committee
- Lake Erie Area women's initiative and minority task force member.

*Ernst & Young, LLP*

*Indianapolis, Indiana*

*Nov 1993 - Feb 1996*

### **Tax Managing Partner Midwest Sub Area**

Responsible for all tax functions of five office, three state (Indiana, Ohio, Kentucky) tax practice including over 300 tax professionals and \$70M in revenues

*Ernst & Young, LLP*

*Orlando, Florida*

*March 1990 – Nov 1993*

### **Mid Florida Office Tax Leader for Orlando and Daytona Beach Locations**

*Ernst & Young, LLP*

*Atlanta, Georgia*

*Sept 1985 - March 1990*

### **Tax Senior Manager**

*Aldridge Borden & Co. PC*

*Montgomery, Alabama*

*Jan 1975 - Sept 1984*

### **Partner**

*West Point Pepperell*

*West Point, Georgia*

*Sept 1974 - Jan 1975*

### **Internal Auditor**

## **Education**

BSBA Accounting

Auburn University

June 1975

MTX (Masters Taxation)

Georgia State University

Sept 1985

## **Professional Certifications**

AICPA Member

PFS designation received in 1988 (currently inactive)

CPA certificates (current and former): Alabama, Georgia, Florida, Indiana and Ohio

*References Available upon request*