Joseph-Paul (JP) Timpano, CPA

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Professional Summary

Seasoned CPA with over 35 years diversified accounting control & solutions experience to business & consumer clients. In 1991 formed JPT Financial Solutions Inc., a key provider of eldercare accounting services, consultant & advisor professional, and tax/accounting practitioner. From 1984 to 2010 joined Citigroup as an officer of the bank & served as solutions lead analyst, global reporting hierarchy coordinator, financial process coordinator, financial analyst, & MIS production manager.

Earned a reputation as a proficient financial process troubleshooter & problem solver with the ability to identify, visualize, articulate & solve problems & concepts in unfamiliar settings. Noted by financial leaders & clients as an independent & strategic thinker, bringing acumen & expertise to improve bottom line performance, as is recognized for coordination, organization, communication & leadership skills, & internal control development.

Licensed CPA in New Jersey and New York. A member of the New Jersey Society of Certified Public Accountants & the National Association of Tax Professionals. Commissioned as a Notary Public.

Career Experience

JPT Financial Solutions, Inc.

419 River Road, Bogota, New Jersey 07603

CEO & President (1/1991 - Present)

A customer-service driven provider of an umbrella of nonattest professional services including eldercare accounting services, consultation & advisory services, tax return preparation & general accounting services to business and consumer clients.

- **Eldercare Accounting Services**
  - Provide elder clients with assistance for their daily financial affairs, business & related duties
  - Assist in getting the financial house in order during the care of the elder client
  - Organize financial records to identify all assets, liabilities, revenue sources & expense commitments
  - Set up a process to establish necessary internal controls over a client’s financials
  - Review & payment of household bills, budgeting, record keeping & balancing of bank accounts
  - Monitor & track total financial portfolio including cash receipts, investments & real estate
  - Preparation & filing of income, trust, gift & estate tax returns & related planning
  - Provide accounting services to the estate to wrap up financial matters after a parent’s death

- **Consultation & Advisory Services**
  - Provide business consultation including guidance & reporting for start-up businesses, business solutions, & assist with loan applications, credit policies, cash flow concerns, cost controls & other management issues
  - Coordinate personal finance including establish budget for individuals, organize bank accounts and financial records, periodic review of financial position, & manage monthly payments & receipts
  - Strategic planning & analysis
  - Oversee project management through planning, implementation & quality control
  - Proficient financial process coordinator, troubleshooter & problem solver
  - Deliver analytical consultation services to help clients better organize, coordinate & control their financial performance
  - Assist clients to develop measures of internal control to mitigate risk & improve performance

- **Tax Preparation Services**
  - Prepare Federal & State personal & business related tax returns & related information return filings to meet required governmental compliance & deliverables
  - Assist clients in tax planning measures to minimize tax liability & risk
  - Tax return preparation & filings:
    - Federal & State individual tax returns
    - Business tax returns (Sole Proprietor, Partnerships, Corporations, LLCs, LLPs)
    - Estimated tax analysis & planning
    - Non For Profit reporting
    - Gift & Estate tax return preparation
    - Quarterly & Year-end payroll tax returns
    - 1099, W-2 & information returns
    - E-payment of taxes via EFTPS & States

- **General Accounting Services**
  - Implement the general ledger, bank reconciliation & payroll reporting for the client
  - Establish a system for bookkeeping, & provide management reporting & analysis to accommodate the needs of the business owner
  - Administer estates & trusts
  - Executor of estate, trust, power of attorney
  - Financial record organization
  - Notary Public services

Citigroup, Inc.
111 Wall Street, New York, New York 10005

Vice President (5/1984 – 3/2010)

Provided accounting control & solutions services related to all phases of corporate management reporting:

- Solutions Lead Analyst
- Global Reporting Hierarchy Coordinator
- Financial Process Coordinator
- Financial Analyst
- MIS Production Manager

Responsible for coordination & development of global business management reporting hierarchies, financial analysis & budgeting, development of the monthly reporting process, coordination of the yearly division budget process, production of the monthly division head reporting packages & key performance indicators, implementation of internal control standards, strategic planning, communications liaison, and served as financial advisory to global & regional controllers.

Education & Professional Status

Rutgers University
Newark, NJ 07102
BA With Honors in Accounting, May 1982

Licensed as **Certified Public Accountant**
• by NJ State Board of Accountancy, Jan 1988
• by NY State Education Department, Dec 2009

Commissioned as **Notary Public**
State of NJ, Sept 1995

Member of **NJ Society of Certified Public Accountants**

Member of **National Association of Tax Professionals**