



# Daniel Osei

JUNIOR TAX ASSOCIATE

## PROFILE

BSc Accounting and Taxation graduate from the University of Nottingham with practical experience in self-assessment returns, corporation tax, and VAT compliance. Completed a summer internship at a regional accountancy firm where I prepared 32 tax returns and assisted with 4 corporation tax computations. Also managed the bookkeeping for a family-run business with £280,000 annual turnover, including error-free VAT submissions over 6 quarters. Currently studying toward the ATT qualification with the first paper (Personal Taxation) already passed. Looking for a junior tax associate role at a firm where I can build my technical expertise and progress toward CTA.

## EDUCATION

### BSc (Hons) Accounting and Taxation in Accounting and Taxation

University of Nottingham, Nottingham

Sep 2022 – Jul 2025

## SKILLS

- UK Personal Taxation
- Corporation Tax Computations
- VAT Compliance
- Self-Assessment Returns
- TaxCalc
- IRIS Tax Software
- Xero (bookkeeping & VAT)
- Microsoft Excel (formulas, pivot tables)
- Bank Reconciliation
- Financial Record Keeping
- HMRC Online Services
- Attention to Detail
- Research & Legislation Review

## LANGUAGES

- English - Native
- Twi - Conversational

## REFERENCES

### Rachel Thornton

Rowleys Chartered Accountants  
available upon request

## EXPERIENCE

### Summer Tax Intern, Rowleys Chartered Accountants, Leicester

Jun 2025 – Aug 2025

Joined the personal and business tax team at a regional practice with approximately 800 clients.

- Prepared **32 self-assessment tax returns** for individuals including sole traders, landlords, and employees with additional income
- Assisted with **4 corporation tax computations** for SME clients with turnover between £500K and £3M
- Researched **capital allowances** for a manufacturing client acquiring £120,000 of new equipment, producing a summary memo for the senior manager
- Used **TaxCalc and IRIS** software to input data, run calculations, and generate return submissions

### Bookkeeper (Part-Time), Osei & Sons Hardware Ltd, Nottingham

Sep 2023 – May 2025

Managed the bookkeeping for a family-run hardware business while studying full-time.

- Processed an average of **150 purchase and sales invoices per month** using Xero
- Reconciled **3 bank accounts** on a weekly basis, maintaining zero unreconciled items for 20 consecutive months
- Prepared and submitted **quarterly VAT returns** with no errors across 6 consecutive quarters
- Assisted the external accountant with year-end accounts preparation, gathering documentation for a business with **£280,000 annual turnover**

## CERTIFICATIONS

### ATT Paper 1: Personal Taxation (Passed), Association of Taxation Technicians

May 2025 – May 2025

### AAT Level 2 Foundation Certificate in Bookkeeping, Association of Accounting Technicians

Jun 2023 – Sep 2023

## PROJECTS

### Dissertation: Making Tax Digital and Sole Trader Compliance Costs

Sep 2024 – Apr 2025

Investigated how HMRC's Making Tax Digital (MTD) programme has affected compliance costs for sole traders.

- Surveyed **42 sole traders** in the East Midlands about their experience with MTD for VAT
- Found that **67%** reported increased software costs but **54%** said record-keeping accuracy had improved
- Recommended phased implementation support and free software access for low-turnover traders

### Group Project: Tax Planning Case Study for a Growing SME

Jan 2025 – Apr 2025

Corporate Tax module project advising a fictional SME on tax-efficient structuring as it grew from sole trader to limited company.

- Calculated the tax implications of incorporation at **3 different turnover levels** (£85K, £150K, £300K)
- Identified **£8,200 in potential annual tax savings** through salary and dividend optimisation for the £150K scenario
- Team received a mark of **74%**

## EXTRA CURRICULAR ACTIVITY

### Treasurer, Nottingham University Accounting Society

Sep 2024 – Jun 2025

Managed the society's finances and helped organise employer engagement events.

- Oversaw a budget of **£1,600** and maintained accurate records for the Students' Union audit
- Co-organised **4 firm open evenings** with practices including BDO, Mazars, and PKF Smith Cooper

**VITA Volunteer Tax Preparer, Citizens Advice Nottingham**

*Jan 2024 – Apr 2024*

Volunteered during tax season to help low-income individuals complete their self-assessment returns.

- Assisted **18 clients** with filing returns, identifying allowable expenses, and understanding payment deadlines
- Attended **12 hours of HMRC-approved training** before the volunteering period