

Julia Mattia

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PROFESSIONAL SUMMARY

Administrative professional with public accounting experience coordinating tax preparation workflows and client documentation.

Background in return processing, file routing, deadline tracking, and confidential records handling within a CPA firm environment. Detail-oriented and reliable in managing high-volume administrative tasks under strict filing deadlines.

RELEVANT EXPERIENCE

Administrative Tax Specialist — Wipfli

Oct. 2022 - May 2024

- Processed and assembled individual and business tax returns for preparers and partners during tax season workflow cycles
- Routed client documents and completed returns through GoFileRoom and SafeSend for secure delivery and signature collection
- Reviewed returns and supporting documentation for completeness prior to filing submission
- Managed high-volume incoming client records, organizing and indexing files within firm document systems
- Coordinated with preparers and administrative staff to meet daily and weekly filing deadlines

ADDITIONAL EXPERIENCE

Assistant Manager — Occasionette

Apr. 2025 - Present

- Coordinates daily operational workflows, scheduling coverage, and task delegation
- Reconciles daily cash reports and investigates balancing discrepancies
- Maintains operational records and documentation for inventory tracking and daily store procedures
- Trains employees on procedures, documentation practices, and POS operations
- Serves as primary point of contact for customer issues and operational problem-solving

Administrative Assistant — DaVita Dialysis

May 2024 - Dec. 2024

- Maintained accurate treatment records and chart documentation in compliance with medical and privacy regulations
- Verified patient records and monitored scheduled treatments within a time-sensitive workflow environment
- Handled confidential patient information in accordance with HIPAA privacy standards

Marketing Content Coordinator — SERI

Mar. 2022 - Sept. 2022

- Produced technical newsletters compiling regulatory and certification updates across 36 countries
- Proofread Knowledge Base articles for clarity, consistency, and adherence to certification guidance

Proofreader — JK Design

Jun. 2021 - Jan. 2022

- Managed multiple concurrent revision cycles with designers and clients to final release

EDUCATION

Bachelor of Arts — Temple University

SKILLS

Tax & Document Systems: CCH Axxess Tax, GoFileRoom, SafeSend Returns

Administrative: Document management, file routing, deadline tracking, data entry

Software: Microsoft Excel, Outlook, Adobe Acrobat