



# Haven Pratt

## Senior Tax Auditor, Business Personal Property

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### STRENGTHS

- 🔍 **Audit judgment**  
Complex records became clearer through focused review of ledgers, leases, depreciation, and valuation evidence.
- 💬 **Taxpayer communication**  
Patient explanations helped taxpayers follow reporting requirements and discuss disputed findings with confidence.
- 👥 **Quiet leadership**  
Four auditors received steady coaching on difficult cases, and peers trusted careful technical review.
- 📊 **Excel analysis**  
PivotTables, macros, and automated workbooks turned large asset lists into useful review signals.
- ♥️ **Appeal preparation**  
Well organized evidence connected law, calculations, and valuation methods for reviewer and hearing use.

### SKILLS

Business personal property auditing

Property tax appraisal

Assessment analysis

Valuation analysis Appeals

Grant administration

Financial analysis

Accounting systems CAMA

Microsoft Excel PivotTables

Taxpayer communication

Audit supervision

### SUMMARY

Senior tax and property assessment professional with eight years supporting **business personal property** audits, valuation analysis, appeals, grant compliance, accounting review, and local government tax administration. Leads desk and field audit portfolios, supervises four auditors, reviews contracted audit work, and prepares defensible conclusions from cost schedules, market evidence, income statements, leases, depreciation, and **property sales**. Advanced Microsoft Excel capability includes PivotTables, macros, automated workbooks, reconciliation controls, audit selection, grant calculations, and management reporting. Holds North Carolina Department of Revenue Personal Property and **Real Property Appraiser** designations plus a valid **North Carolina driver's license**. Brings clear taxpayer communication, CAMA control review, exemption analysis, assessment uniformity reporting, policy development, and sound judgment for complex public sector decisions.

### EXPERIENCE

#### Senior Property Tax Auditor

Triad Municipal Tax Services 📅 July 2024 - Present 📍 Greensboro, NC

Leads complex **business personal property** audit operations, valuation review, grant compliance, CAMA controls, appeal support, reporting, and staff supervision for municipal tax clients.

- Led commercial property audits through review, billing, and appeal preparation using statutory **valuation** evidence.
- Supervised four auditors through case planning, **taxpayer meetings**, technical review, and assessment documentation.
- Evaluated cost schedules, market evidence, income statements, leases, depreciation, and sales for **defensible valuations**.
- Validated grant investments, interpreted agreements, calculated payments, and prepared budget forecasts for management review.
- Audited CAMA records and billing workflows, correcting control exceptions before downstream reporting and **tax bills**.
- Prepared appeal analyses, uniformity reports, **state filings**, and total value schedules supporting annual budgets.

#### Property Tax Auditor

Blue Ridge Assessment Group 📅 June 2022 - June 2024 📍 Winston Salem, NC

Performed **business personal property** audits, Excel based analysis, taxpayer communication, exemption review, appeal preparation, contracted audit oversight, and CAMA reconciliation.

- Traced reported assets through ledgers, depreciation schedules, invoices, and **accounting records** during **field audits**.
- Built Excel workbooks with **PivotTables**, macros, and automated checks, standardizing large asset reconciliations.
- Explained reporting expectations and adjustments during **taxpayer meetings**, documenting evidence for disputed values.
- Connected financial evidence, assessment law, valuation methods, and calculations within appeal files for hearings.
- Reviewed exemption and exclusion filings, documenting ownership facts and escalating novel statutory questions.
- Tracked contracted audit deliverables and reconciled findings with **CAMA** records before assessment updates.

#### Tax and Grant Compliance Analyst

Carolina Fiscal Advisory 📅 June 2020 - May 2022 📍 Durham, NC

Policy development

Management reporting

## LANGUAGES

English Native

Spanish Intermediate

## MY CAREER



● Senior Property Tax Auditor at Triad Municipal Tax Services (2.2 Years)

● Property Tax Auditor at Blue Ridge Assessment Group (2 Years)

● Tax and Grant Compliance Analyst at Carolina Fiscal Advisory (1.9 Years)

● Staff Auditor at Oak City Accounting Partners (1.9 Years)

Supported public sector tax and grant assignments through **accounting** review, valuation research, **compliance** monitoring, budget tracking, reporting, and organized case administration.

- Reviewed **accounting records** and tax data, identifying reporting issues for audit follow up.
- Translated grant provisions into calculation models and payment recommendations for program managers.
- Created Excel trackers with formulas and reconciliation controls for grant forecasting decisions.
- Analyzed income statements, lease terms, **depreciation**, and asset transactions during **valuation** research.
- Drafted concise reports explaining exceptions, assumptions, and source documentation for decision makers.
- Maintained electronic case files and reporting logs, preserving support for management and external inquiries.

### Staff Auditor

Oak City Accounting Partners 📅 June 2018 - May 2020 📍 Raleigh, NC

Executed financial and tax related audit **procedures**, fixed asset testing, Excel analysis, authoritative research, client communication, and workpaper preparation for small and midsize organizations.

- Reconciled ledger activity with source records, documenting audit exceptions for senior review.
- Tested fixed asset additions, disposals, **depreciation**, and invoices supporting property reporting conclusions.
- Prepared Excel schedules for sampling, account analysis, reconciliations, and financial statement support.
- Researched accounting and tax questions using authoritative guidance, summarizing conclusions in workpapers.
- Clarified document requests with accounting contacts, maintaining professional follow through completion.
- Organized workpapers and final support packages for supervisory review and external inquiries.

## PROJECTS

### Municipal Grant Compliance Model 📅 2024

Small details can decide whether a public investment program remains credible. Built an Excel based model connecting agreement terms, investment evidence, payment calculations, compliance checks, and budget forecasts for management review.

### Assessment Uniformity Reporting 📅 2023

A fair assessment begins with evidence that can be explained. Prepared analytical schedules comparing property values, audit findings, CAMA records, and reporting populations for finance and tax administration decisions.

## LEADERSHIP & AWARDS

- Senior Tax Auditor leadership recognition for supervising four auditors and guiding complex assessment reviews.
- Professional recognition for accurate grant compliance models, appeal support, and management reporting.
- Leadership contribution through coaching auditors on financial analysis, documentation, and defensible valuation practices.

## EDUCATION

### Bachelor's Degree in Accounting

University of North Carolina at Greensboro 🎓 GPA: 3.5 📅 2018 📍 Greensboro, NC

**Coursework:** Financial accounting, auditing, taxation, accounting systems

## CERTIFICATIONS

- North Carolina Department of Revenue Personal Property Appraiser 📅 2021
- North Carolina Department of Revenue Real Property Appraiser 📅 2025
- Valid North Carolina Driver's License 📅 2025

## TECHNICAL SKILLS

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- **Audit Methods:** Desk audits, Field audits, Contracted audits
- **Valuation Evidence:** Cost schedules, Market comparisons, Income analysis
- **Accounting Records:** General ledgers, Income statements, Depreciation schedules
- **Microsoft Excel:** PivotTables, Macros, Automated spreadsheets
- **Tax Administration:** Business personal property, Assessment billing, Tax reporting
- **CAMA Systems:** Record audits, Billing workflows, Administrative controls
- **Appeals Support:** Appeal analyses, Hearing files, Assessment conclusions
- **Grant Administration:** Compliance monitoring, Payment calculations, Budget forecasts
- **Property Appraisal:** Personal property appraisal, Real property appraisal, Assessment uniformity
- **Reporting Tools:** Management reports, Statistical analysis, State filings
- **Legal and Policy Review:** Assessment laws, Grant agreements, Tax policies
- **Office Technology:** Microsoft Word, Microsoft Outlook, Electronic case files

## PROFESSIONAL AFFILIATIONS

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- North Carolina property tax administration and assessment professional community.
- Public sector accounting, auditing, and grant compliance professional network.

## ADDITIONAL INFORMATION

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**Work Status** : Authorized to work in United States. No sponsorship required.

## REFERENCES

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AVAILABLE ON REQUEST