

YI SHRESTHA



Yi is a principal in our tax department. She has been providing quality tax services to a variety of clients in the real estate investment, manufacturing, high wealth individual, small business owners, and US Resident Aliens. Yi works closely with clients, estate and trust attorneys to provide timely and valuable tax and advisory services.

PROFESSIONAL EXPERIENCE:

- Experienced in estate and trust, working directly with estate attorneys and trustees to ensure timely deliverable and distribution
- Preparation and review of tax returns comprised of individual, partnership, corporation, estate, trust, tax-exempt organization, and foreign reporting
- Tax planning for individuals, small business owners, estate, and trust
- Financial statement reviews and compilations for small business entities
- Serves as Power of Attorney to handle clients' tax notices, corresponds with agents at the IRS, Comptroller of Maryland, and out-of-state tax authorities to resolve notice issues
- Provides controller service to assist business clients for year-end closing

BACKGROUND:

- Licensed CPA in the state of Maryland
- Certified ProAdvisor Advanced Online, Intuit QuickBooks
- Bilingual in English, Mandarin, and Cantonese
- Master of Business Administration in Finance, Loyola University Maryland
- Bachelor of Arts in Accounting, Towson University

THOUGHT LEADERSHIP:

- Presenter, "Chinese Webinar: PPP Loan Forgiveness Recommendations," Asian American Chamber of Commerce, July 22, 2020
- Assists in developing best practice for tax preparation and work flow process, leads the implementation of the best practice procedures
- Assists with UHY's National Tax Binder Standardization Committee
- Serves on office Operational Excellence Committee
- Guest speaker for Beta Alpha Psi, the international honor society for accounting students at the local universities

PRINCIPAL, UHY ADVISORS MID-ATLANTIC MD, INC.

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INDUSTRY EXPERTISE:

- Estate and Trust
- Individual Taxation
- Business Taxation
- Tax-Exempt Organization Taxation
- Year-end Control

ACTIVE & PRIOR PROFESSIONAL MEMBERSHIPS:

- American Institute of Certified Public Accountants, member
- Maryland Association of Certified Public Accountants, member

ACTIVE & PRIOR CIVIC MEMBERSHIPS:

- Joppa View Elementary School PTA, past Treasurer