

Morgan Larson

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Education

The University of Arizona, Eller College of Management

Master of Accounting – Emphasis in Taxation

Class of 2016

GPA: 4.0

Bachelor of Science in Business Administration-Accounting

Class of 2015

Major GPA: 4.0 Cumulative GPA: 3.66

Honors: Graduated *Cum Laude*

Outstanding Senior -Department of Accounting

Outstanding Senior – SSS/TRiO

Four-time Honorable Mention and Two-time Dean’s List Recipient

Publications

James M. Susa and Morgan N. Larson, *Colorado Solves Use Tax Collection Conundrum: Remote Sellers Must Report Buyers*, 34 J. ST. TAX’N 21 (2016)

Certifications and Licenses

Arizona Board Certified Public Accountant

Member AICPA

Member Arizona Society of CPAs

Work Experience

Ernst & Young LLP, Phoenix, Arizona

Tax Manager:

May 2021 – July 2023

- Prepare responses to IRS exam requests and draft protests for IRS Appeals conferences
- Develop and implement custom tax planning strategies in anticipation of legislative changes
- Assist clients with IRS disputes, controversy issues, and litigation strategy
- Chaired the development and implementation of an Inclusiveness Council to better align EY’s diversity and inclusion strategies with local professional networks

Tax Senior:

October 2018 – May 2021

- Designed and led go-to-market campaigns focused on the legislative changes in the CARES Act and the Tax Cuts and Jobs Act, generating over \$700 million in cumulative tax savings for my clients
- Researched and prepared written tax advice on technical issues and transactions
- Planned and executed a two-day CPE seminar focused on relevant tax issues for domestic banks

Tax Associate:

October 2016 – October 2018

- Assisted with federal tax controversy and IRS correspondence related to a failed bank acquisition
- Authored various technical memorandums and formal tax opinions for regional bank clients
- Aided in the preparation of federal and state tax returns for several large real estate developers

Tax Intern:

June 2015 – August 2015

- Assisted with tax research on various federal tax issues for large financial institutions
- Prepared federal corporate tax return forms and accompanying workpapers
- Reviewed tax provision audit documentation for reasonableness

The University of Arizona, Eller College of Management

Adjunct Lecturer: Accounting Department

June 2016 – July 2016

- Taught an accelerated session of Federal Income Tax Principles to upper-division accounting students

Event Coordinator: Accounting Department

August 2015 – June 2016

- Planned and executed all department-sponsored events with guest counts of up to 500, including students, university employees, and external organizations interested in recruiting accounting majors

The University of Arizona

Student Business Manager: Academic Success and Achievement

August 2013 – May 2015

- Provided administrative support to the Federal TRiO grant and the Arizona Assurance Program
- Supported Principal Investigator with projecting funding capabilities and potential concerns
- Coordinated and oversaw program-wide events for 100-150 students

Department Assistant: Student Retention

November 2012 – November 2013

- Assisted business team with initiating and processing financial transactions
- Utilized university analytics software to generate and evaluate departmental financial statements.

Peer Advisor: Prodigy and New Start Program

May 2012 – May 2013

- Oversaw two cohorts of 20 under-represented college freshmen
- Presented and organized events related to transitional skills to increase student retention

University City Church, Tucson, Arizona

Bookkeeper:

December 2012 – June 2015

- Monitored and tracked an \$8 million construction project and a \$1.2 million operating budget
- Presented financial statements quarterly to the Board of Advisors and accounting firm

Professional Awards and Leadership

EY Phoenix Inclusiveness Council Coordinator 2020 – Current

EY Professional Women's Network, Phoenix Chapter Committee Member 2019 – Current

EY Phoenix Culture Champion Award 2020

Awarded to an individual who demonstrates a leadership role within EY's diversity and inclusiveness initiatives and promotes a culture that builds on successful relationships

EY Phoenix Tax Learning Committee Vice Chair 2018

EY Phoenix Better Teaming/Team Spirit Award 2017

Awarded to an individual who enables better teaming by modeling inclusive behavior

Collegiate Activities and Involvement

SSS/TRiO Program, Member

August 2012 – May

2015

A federal grant program established to increase the graduation rates of first-generation college students, those from low-income households, and students with disabilities through community, individualized educational, and co-curricular plans.

Volunteer Income Tax Assistance (VITA)

January – April 2013 & 2014

Tax Counseling for the Elderly (TCE)

The IRS's Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs offer free basic tax return preparation to qualified individuals. All VITA/TCE volunteers who prepare returns must pass tax law training that meets or exceeds IRS standards.

Accounting Student Association, Member

August 2012 – May 2013

A student organization dedicated to providing students with opportunities to learn and network with accounting firms and other accounting students through club meetings, service events, and socials.