MAX ZACK YOFFEE

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EDUCATION

The Pennsylvania State University — **University Park, PA**
Smeal College of Business: Bachelor of Science, Accounting — *Class of May 2018*
Two-Piece Sequence: Finance — Cumulative GPA: 3.5/4.0

RELEVANT EXPERIENCE

Deloitte & Touche LLP — **Pittsburgh, PA**
Tax Consulting Intern — *June 2017 – August 2017*

- Gauged R&D projects for tax credits by evaluating technical uncertainties and process of experimentation on each project design
- Constructed project description matrices that detailed R&D developments and qualifications for tax credits for IRS review
- Followed IRS procedures to file international tax form 5471 for corporations and 8858 for disregarded entities
- Consulted with individual client to prepare IRS form 1040 for current year and recommend plan for upcoming years

PricewaterhouseCoopers LLP — **New York, NY**
Financial Markets Intern — *January 2017 – March 2017*

- Provided consulting services to financial institutions to ensure compliance with reporting and withholding obligations
- Coordinated and reviewed Automatic Exchange of Information programs to comply with the Common Reporting Standard
- Prepared and reviewed IRS Forms W-8BEN, W-8BEN-E, W-8EXP, W-8IMY, W-9, and 1042 to ensure FATCA Compliance
- Evaluated Financial Institution hedging programs to confirm proper implementation and execution

MZY Enterprises LLC — **Pittsburgh, PA**
Founder and CEO — *August 2007 - Present*

- Founded and managed a lawn care and landscaping business that generated $50,000 in revenues and serviced over 100 customers
- Enhanced brand loyalty and recognition by utilizing website features, brochures, a company logo, and personal references
- Sold landscaping sector of business in June 2014 to a well-established landscaping company
- Began ticket distribution subsector of business in 2016 that has generated over $10,000 of revenue

Keurig Green Mountain, Inc. — **Burlington, MA**
Internal Audit Intern — *May 2016 - August 2016*

- Provided objective and professional evaluations of Keurig and its operations and internal controls
- Evaluated global inventory including K-cup obsolescence, lower of cost or market analysis, and physical counts
- Created and tested internal controls ensuring that all k-cup royalty payments to Dunkin Donuts were properly recorded and paid

Wall Street and Real Estate Boot Camp — **University Park, PA**
Graduate — *August 2016 – Present*

- Selected from a group of 400 applicants for a class of 44 to participate in weekly educational sessions held by Wall Street professionals discussing career paths on Wall Street

Penn State Investment Association — **University Park, PA**
Analyst, Consumer Discretionary Sector — *January 2015 - Present*

- Engaged in weekly performance meetings for the Nittany Lion Fund, a $7 million equities-focused mutual fund
- Developed skills pertaining to financial analysis, market metrics, and equity research

LEADERSHIP EXPERIENCE

Private Pilot — **Pittsburgh, PA**
FAA Certified Pilot with Instrument Rating — *June 2014 - Present*

- Holder of Private Pilot Certificate with instrument rating given by the Federal Aviation Administration
- Certified to operate single-engine land aircrafts up to 12,500 pounds in less than visual weather

Alpha Epsilon Pi Fraternity — **University Park, PA**
House Manager and Alumni Chair — *September 2014 - Present*

- Modernized house by building temporary fence, re-carpeting rooms, adding bathroom necessities, and improving laundry room
- Initiated comprehensive alumni relations and capital campaign, targeting $10k annually, to position AEPi for long-term success

AWARDS, SKILLS & INTERESTS

- Awards: Dean's List, Pittsburgh Promise Executive Scholar, Ida Wagner Fellowship Award, Central Scholarship Recipient, Phi Sigma Delta Sigma Educational Scholarship Recipient
- Skills: Proficient with Microsoft Office products (Excel, PowerPoint, and Word), Zamboni Driver, Yellow Belt – Six Sigma
- Interests: Entrepreneurship, financial markets and derivatives, aviation, politics, poker
- Actively pursuing: Commercial Pilot's Certificate, Certified Public Accounting License