

Shelley K. Phillips



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Operations Assistant

Education:

Community College of Rhode Island

AS, Accounting

Ms. Phillips joined Bradley, Foster & Sargent as an Operations Assistant in June, 2014. Her responsibilities include performance calculations, asset allocation compliance testing, billing functions and assisting with operational and administrative functions. Ms. Phillips most recently worked for Sheptoff, Reuber & Company, in Glastonbury, CT, where she was a staff accountant, preparing and reviewing tax returns; working with clients to resolve IRS and state audits; preparing end-of-year payroll and payroll forms; performing tax planning and forecasting; and performing other general accounting and bookkeeping duties. Previously, she worked at H&R Block as a senior tax advisor and at HT Investors as an operations manager.

