

PERSONAL DETAILS

CONSULTANT:

J.W. Shepherd MBA, MSIS

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EMAIL :

jwshepherd@elites-of-texas.com

Work Status: US Citizen
Public Trust (Active)
Security Clearance (Active)

SUMMARY :

An experienced Senior Functional Consultant / Project Manager with extensive Tax, Finance, Human Resources, Accounting/Auditing and Information Systems background with 25+ years in the Big 4 consulting, private and public sector. *Functional expertise consists of planning, designing, implementing, configuring, mergers & acquisitions, reporting, supporting, testing, training and validating global ERP Financial systems utilizing Methodologies such as: ASAP, AIM, GAAP, IFRS, Solution Manager, SCRUM, Six Sigma, Agile, Azure DevOps and S/4 HANA.

- **15+** Global **SAP** Implementations - Versions: 3.0, 3.1, 4x, ECC 5.0, 6.0, S/4 HANA
- **3+** S/4 HANA Implementations: 1 Brownfield Cloud, 2 Greenfield (On Premise and Cloud)
- **30+** Tax - 3rd Party Implementations (Vertex, Taxware, Sabrix, Zytax), TESCO, Hyperion Tax, DaRT, International Tax (Canada, European, South / Latin America - Brazil, Asia Pacific, Africa, Middle East, Australia)

Indirect Tax: Sales and Use Tax, VAT, Tax Compliance

Direct Tax: Withholding, Excise, Income Tax, Property Tax, Payroll, Transfer Pricing

Vertex: L,O,Q, Sales Tax Return, Payroll, VRA, Communication Service Tax, VAT, On Premise and Cloud, Tax Accelerator, Reporting

Taxware (SOVOS): Sales and Use Tax, Enterprise, Reporting

ONESOURCE/Sabrix: Tax Determination, Tax Returns, Calendar, VAT, Mastersaf, Global Next, Transfer Pricing, Property Tax, Income Tax, Reporting

Ariba: Sales and Use Tax, Withholding, VAT, Buying and Invoicing

Avalara: Avatax, Epicor Tax Connect; **Zytax:** Fuels Excise Tax, Determination

PowerPlan: PowerPlant Asset Accounting, Property Tax, Income Tax, PowerTax

LCR Dixon: VENDOREcon, SPOT Reports, Goods Movement

SAP Localization Tax- Advanced Compliance Reporting (ACR)/Document and Recording Compliance (DRC)

- **DaRT / Data Archiving:** **SAP**, ILM, OpenText
- **Treasury:** **SAP**, Oracle, Wall Street, Reval and Sunguard
- **6** Oracle Implementations - Versions: 10, 11i, r12 E Business, Fusion
- **6** Peoplesoft Implementations
- **3** JD Edward / Infor / Great Plains / Hyperion / Workday Implementations
- **Additional Accounting Software:** Amazon Web Services (AWS) Marketplace Tax Calculation Services, Ariba, Infor, Blackline, Deltek Costpoint

NEW International Tax Requirements: Spain SII, SAF-T (Poland, Portugal, France), Peppol, E-Invoicing (Mexico, Germany, France, Taiwan), India GST

EDUCATION:

Stanford University, Stanford, CA
Masters Certificate – Project Management

University of St. Thomas, Houston, TX
Masters of Science - Information Systems, December 2001

Texas Southern University, Houston, TX
Masters in Business Administration - Finance, December 2000

Southern University A & M, Baton Rouge, LA
Bachelors of Science - Accounting, May 1996

SAP

SPECIALTIES:

FI: A/P, A/R, G/L, new GL, PS, FSCM: Fixed Assets, Joint Venture, Production Revenue Accounting (**PRA**), Travel Management (Travel & Expense - Concur), OpenText VIM, Funds/Grants Management, Central Finance, Revenue Accounting Reporting (RAR);

TAX: Indirect Tax, Direct Tax, Excise, Income, Sales and Use, Motor Fuels, Withholding, Payroll – Tax, Ariba Tax, Vertex, Onesource (Sabrix), Taxware, Zytax, Tax Revenue Management, DaRT, Canadian and VAT International (European, South America, Asia Pacific, Africa, Middle East and Australian), **SAP** Localization Tax HUB, Global Tax Management – Advanced Compliance Reporting (ACR), Document and Reporting Compliance (DRC);

SD: Integration to FI: Order-To-Cash, Billing, Resource Related Billing, Customer Relationship Management, Pricing, FSCM: Deduction/Credit Management; BRIM

MM: Integration to FI: Purchase-to-Pay, Purchasing, Ariba, Contract Lifecycle Management (CLM)

PROJECT EXPERIENCE

**CONFIDENTIAL
Houston, TX
(1/2003-Present)**

SAP FI/CO/Tax/ VAT /Treasury Technology Project Manager / Architect

ERP Tax: Indirect and Direct Tax: Sales & Use, VAT, Excise, Withholding, Motor Fuels, Income, Canadian, Payroll, 1099, Tax Revenue Management (TRM), Revenue Recognition, DaRT, **SAP** Localization Tax - Advanced Compliance Reporting (ACR) and Document and Recording Compliance(DCR)

Tax Software: Vertex, Taxware, OneSource/Sabrix Global Next, PowerPlan/PowerTax, Ariba Tax, Avalara (AvaTax) / Zytax, Mastersaf, MasterTax

- Global implementations, blueprint, configuration, testing and support of **SAP** FI/CO, Treasury and Tax utilizing methodology best practices in US, Canadian and International Tax (Countries: Austria, Australia, Belgium, Brazil, Czech Republic, France, Germany, Hungary, Italy, Luxembourg, Netherlands, Portugal, Spain, Switzerland, UK)
- Responsible for implementation, integration, support and training of tax solutions: Vertex (L,O,Q, Sales Tax Return, Payroll, VRA), SABRIX (OneSource), Sovos (Taxware), Avalara and BSI into **SAP**, Oracle, Peoplesoft, Amazon Web Services (AWS), Ariba
- Tax System integration / configuration with **SAP** system versions (ECC and S4 HANA) for transactional tax: Sales and Use Tax (SUT), Value Added Tax (VAT), Withholding Tax, Canadian, Excise Tax and all International countries
- Architect / Project Manager / Hands on Consultant for Tax implementation project which included initial operations analysis, business process re-evaluation, testing, training, conversions, customizations, documentation and implementation of modules
- Liaison with business, Corporate tax department and Tax Advisors to understand the tax requirements in the development of the functional design and build of the technical solutions, whether involving interfaces, reporting, or application modifications
- Provide Tax Leadership & Guidance for on-going operations for Direct and Indirect Tax (FAS 109; International, U.S. and State Transactional Planning, IFRS, TESM, Tax Reporting and Compliance)
- Perform requirements FI, SD, MM (OTC and PTP) and analysis workshops with the Client to define business process and data element requirements
- Utilize system Best Practices to analyse project risks and mitigation issues to support Digital tax transformation projects
- Manage EU and local country requirements covering all areas of local tax and compliance requirements- these include requirements around local country Corporation Tax, Sales & Service tax, VAT, Withholding Tax, foreign currency dealings, transfer pricing, etc.
- Design, configure **SAP** DaRT / Data Archiving solution based on Tax, Auditing and Legal (IRS, Sarbanes Oxley, COBIT and International Statutory) requirements
- Technical/Functional knowledge of the **SAP** ECC Data Retention Tool (DaRT) to include all DaRT functionalities including: Configuration, Testing, Storage
- Global Tax Management **SAP** Localization HUB – Advanced Compliance Reporting (ACR) and Document and Reporting Compliance (DRC) country specific reporting.
- Experience in International VAT, INTRASTAT and EXTRASTAT, SAF-T Reporting
- Understanding tax treatment and reporting on Exports/ Imports across EU and out of EU.

- Project Industries consist of:
 - Aerospace & Defense: S/4 HANA, Tax (FI/SD/MM) Tax, Sales and Use, VAT, Withholding Tax, .Vertex O series 9.0, OpenText VIM, Concur (AP), BRIM, Tax Accelerator, Advanced Compliance Reporting (ACR)
 - Pharmaceutical: **SAP** S4 HANA Greenfield Cloud - FI/SD/MM Tax, Sales and Use, VAT, Withholding Tax, Document and Reporting Compliance (DRC), Vertex O series 9.0 Cloud, Vertex Accelerator, Ariba Tax Buying and Invoicing
 - Public Sector (DOD): **SAP** FI, Funds Management (FM), S4 HANA Assessment
 - Technology/Software: **SAP** FI/SD/MM/ RMCA Tax, VAT, Indirect Tax, Vertex O series 9.0 Cloud, API Integration, BRIM, Online Retail/E Commerce, Document and Reporting Compliance (DRC), Tax Accelerator, Azure Dev Ops, US, Canada, Nigeria, Mexico, Europe and APAC
 - Utilities: **SAP** FI/SD/MM Tax, FI/CA, BRIM, Indirect Tax, Upgrade from Vertex Q to Vertex O series 9.0, Tax Reporting, **SAP** Accelerator, US and Canada
 - Life Science: S/4 HANA Brownfield Cloud, **SAP** Tax (FI/SD/MM), OpenText VIM, ONESOURCE, VAT, LCR Dixon: Goods Movement, SPOT Report , Tax Accelerator, **SAP** Localization Tax HUB – Advanced Compliance Reporting (ACR), Direct Tax
 - **Oil & Gas**: **SAP** FI/SD/MM Tax, Withholding Tax, OpenText, Global Next, ONESOURCE Indirect Tax and Tax Provisions, Ariba, Tax Reporting
 - Public Sector (DOD): **SAP** FI, Funds Management (FM), Budget, Treasury, Banking, Assets, Project Systems and Revenue Accounting and Reporting (RAR)
 - Software: Amazon Web Services (AWS), AWS Marketplace Sellers and Tax, Vertex O series, Indirect Tax, Revenue Accounting and Reporting (RAR)
 - Chemical: **SAP** FI/SD/MM Tax, S/4 HANA Greenfield Cloud, ONESOURCE Indirect/Direct Tax: Sales and Use, VAT, Transfer Pricing, Ariba, E-Invoice (Mexico, Taiwan), Brazil, India GST, Global Tax Management, **SAP** Localization Tax HUB – Advanced Compliance Reporting (ACR)
 - Consumer/Retail: **SAP** S/4 HANA Greenfield On Premise, FI, Central Finance, Tax, VAT / Intl, Sabrix/ONESOURCE Global Next, DaRT, SAF-T (Poland, Portugal, France), Spain SII, E-Invoice (Mexico, Germany, France,), Tax - Advanced Compliance Reporting (ACR)
 - Public Sector (State): **SAP** FI, G/L, A/P, PS, Banking, Treasury, Tax, CAFR, Revenue Recognition (RAR), HR Travel Management/Concur
 - Chemical: **SAP** 6.0, FI (A/P , A/R, G/L, **PRA**/JVA, Banking, OpenText VIM), CO (Costing Material Ledger, Internal Orders) Vertex, Tax: (Sales & Use, Withholding, VAT), Brazil, Germany, Poland, Italy, France, Australia, Asia Pacific, Spain), Tax Compliance Reporting
 - Retail: **SAP** S/4 HANA Central Finance Prototype, Tax, VAT, Revenue Recognition (RAR), ILM - DaRT, Data Archiving, OpenText
 - Public Sector/Utilities: **SAP** FI, A/P, Tax, Treasury, HR Concur, Deltek Costpoint
 - Hi-Tech: **SAP** FI, CO, CRM, Tax, SD – Sales Tax, VAT (Commissionaire, Client, LRD Model) / International Tax, VRA, Vertex O SaaS (US/Canada)
 - Consumer/Retail: **SAP** ECC 6.0, FI, A/P, OpenText-VIM, A/R, PS, Treasury, FSCM (Supply Chain), Tax, ILM -DaRT, Sabrix/ONESOURCE Global Next, Canadian Tax
 - Financial/Banking: **SAP** 6.0, FI (G/L, A/P, Revenue Recognition), Business Planning & Consolidations (BPC), Ariba, Tax – Use Tax, Vertex, Blackline
 - **Oil & Gas**/Manufacturing: **SAP** 6.0, FI (A/P, A/R, GL, P/S, Assets, Tax, JVA), BPC, Material Ledger, Taxware, Treasury, Payroll/FI Integration, Ariba
 - Big 4 Consulting Industry: (**SAP**, Oracle, JD Edwards): FI, Tax (Vertex, Sabrix /Onesource, Taxware, AvaTax),VAT / Intl Tax, ILM - DART / Data Archiving, OpenText
 - **Oil & Gas** Industry: **SAP** FI, Tax, PowerPlan –Assets, Tax Provisions, PowerTax, Property/Income Tax, Blackline
 - Aerospace & Defense: Global **SAP** 6.0, FI(AP(ReadSoft),AR, Travel Management (Concur), new GL, SD (EDI), MM (Ariba), Tax, (US, Canada, Mexico), Vertex, OpenText

- Consumer Products/Retail Industry: SAP FI- A/P, A/R, PS, G/L, POS, FSCM, Tax, DART / Data Archiving / OpenText, VAT / Intl, SD, MM
- Oil & Gas Industry: Assessment, Support SAP FICO ,IS-Oil (PRA – Tax & Royalty, Master Data, Regulatory Reporting, Receivables)
- Public Sector (DOD): SAP FI/CO, P/S, FM, GM, Tax Revenue Management (TRM), Budget, IS-Public Sector, Deltek Costpoint
- Hi-Tech Industry: SAP 6.0, FI, SD, MM, Tax, Vertex Q (US and Canada)
- Consumer Products/Retail: SAP FI/CO, CRM, Tax, Vertex, SD, MM. IS-Retail
- Public Sector (A&D): SAP FI/CO, SD, Tax, Zytax, Taxware, IS-A&D
- Big 4 Consulting Industry: (SAP, Peoplesoft, Oracle, JD Edwards) FI, Tax (Vertex, Sabrix/Onesource, Taxware, Avatax),VAT / Intl, DART
- Public Sector (State): RFP - ERP Assessment, Financials
- Consumer Products / Retail: SAP FI/CO, POS, Tax,Vertex O, IS-Retail, SD/MM
- Software Industry: SAP FI/CO, Tax, Sabrix, VAT / Intl, SD, MM
- Manufacturing Industry: SAP FI/CO, Tax, Vertex Q, SD, MM
- Utilities Industry: SAP FI-CA, Tax, Vertex, FERC, CRM, IS-Utilities
- Public Sector (State): SAP FI, FM, GM, HR – Payroll Tax/BSI, Benefits, Travel Management, IS-Public Sector, Concurrent Employment
- Oil & Gas Industry: SAP IS-Oil, FI/CO, PRA-Tax, VAT, Treasury/Wallstreet
- Energy Industry: SAP FI, Assets, TR (Sungard), Tax, PowerPlant-Tax Provisions, PowerTax, Vertex
- Consumer Products / Retail: SAP FI- A/P,A/R,G/L, POS, Tax, Vertex, IS-Retail
- Utilities Industry (2 clients): SAP FI-CA, CCS, Billing, FERC, CRM, Tax, Vertex, IS Utilities /IS -Public Sector
- Public Sector (A&D): SAP FI/CO, IS-A&D, SD, MM
- Semi-Conductor Industry: SAP FI, Tax, DART, Sabrix, VAT / Intl
- Media Industry: SAP FI/CO, Tax, Vertex, SD, MM
- Software Industry: SAP FI, Tax, Taxware, SD, MM, VAT / Intl
- Big 4 Consulting Industry: (SAP, Peoplesoft, Oracle, JD Edwards) FI, Tax (Vertex, Sabrix, Taxware),VAT / Intl, DART / Data Archiving
- Telecom Industry: SAP FI, RM-CA, Tax, Vertex, FERC, CRM, IS-Telecom
- Telecom Industry: SAP RM-CA, Tax, Vertex, CRM, IS-Telecom
- Pharmaceutical Industry: SAP FI, SD, MM, Tax, Vertex, VAT, IS-Pharma
- Oil & Gas Industry: SAP IS-Oil (PRA- Tax & Royalty), JVA, FI, SD, MM, , Canadian, VAT

**ACCENTURE
CONSULTING
(ERP Tax
Technology
Practice)
Houston, TX
(1/2000-1/2003)**

SAP Financials Functional Consultant / SAP Tax Team Lead / Manager

ERP Financials: SAP, Oracle, Peoplesoft, JD Edwards, Lawson, Infor, Ariba

ERP Tax: Sales and Use, VAT, Excise, Withholding, Motor Fuels, Income, Payroll / BSI, Tax Revenue Management (TRM), DaRT

Tax Software: Vertex, Taxware, Sabrix, Zytax, PowerPlan, Ariba, Concur Tax

Treasury Software: SAP, Oracle, Peoplesoft, Wall Street, Reval, Sungard

Industry Solutions : Oil & Gas/Chemical (PRA, TSW, JV), Utilities, AFS, Media, Pharmaceutical, Telecommunications, Public

Sector, Manufacturing and Aerospace & Defense

- Global implementations, blueprint, configuration, testing and support of SAP FI/CO, Revenue Accounting, HR, SD, MM, CRM, Tax modules utilizing the methodology
- Implement and support Taxware, Vertex SABRIX, Zytax into SAP, Peoplesoft, JD Edwards and Oracle
- Implement SAP (VAT, Sales and Use, Excise, Withholding, Canadian) and International Tax
- Tax System integration / configuration with SAP systems for transactional tax: Sales and Use Tax (SUT), Value Added Tax (VAT), Withholding Tax, Excise Tax and all International countries for SAP, Peoplesoft, JD Edwards and Oracle

SAP FICO / Tax (Indirect and Direct) / VAT / Compliance Reporting / Technology Project Manager / Architect

- Interface with Business Stakeholders, IT Infrastructure teams, Development teams to ensure that business requirements are properly configured within a software package
- Develop Functional Technical specifications for Developers related to user exits, interfaces, conversions and reports
- Conversion of Financial systems data from SAP, Peoplesoft, JD Edwards and Oracle
- Provide Data Quality, Data Cleansing, Data Validation and looking at the whole process of migrating data from the old Legacy Systems to the new SAP Solution
- Provide Documentation and highlighting issues with all the Data Objects to be migrated to SAP (both Master Data and Transactional Data)
- Create SAP Integration with Ariba interfaces, transactions and user-exits between systems
- Develop user manuals and present training workshops for the end users community

SHELL OIL
(formerly
PENNZOIL-
QUAKER)
Houston, TX
(11/1998-1/2000)

Senior SAP FICO Tax Analyst/Lead

SAP Skills: FI/CO, Tax, VAT, SD, MM, Taxware, IS-Oil (PRA and TSW)

- Team Lead on SAP Financial Conversion of G/L, A/P, A/R, PS from Oracle system
- Configuration and support of IS-Oil (PRA - Tax & Royalty) and Trader Schedule Workbench
- Upgrade liaison between the Accounting Dept. and SAP FI/CO support
- Implement and support 3rd party tax system Taxware into SAP system
- Implement SAP (VAT, Sales and Use, Excise, Canadian, Withholding) and International Tax
- Create SAP Tax Integration, interfaces and user-exits between FI, SD and MM
- Validation and compliance of system through Unit, Enhancements, QA, Audits and performance testing of the FI, SD and MM modules

ANDERSEN
CONSULTING
(Oil & Gas &
Chemical Client)
Houston, TX
(5/1996 – 11/1998)

SAP Functional FICO Tax Consultant

SAP Skills: FI/CO, Tax, VAT, SD, MM, Vertex, Taxware, IS-Oil

Key member of a global team implementing SAP R3 Applications in **35 countries**. Personally responsible for the successful global implementation of the SAP FI/CO, 3rd Party Tax System – Vertex and International Tax (VAT, Sales and Use, Excise, Canadian, Withholding) modules in a Multi-Org environment. Conversion of Financial data from Peoplesoft to SAP.

Tax Consultant/Accountant

- Analyze the general ledgers and reporting tool for the documentation in the form of workpapers for files to support these filed returns.
- Prepare Corporate, Sales and Use, Excise, State Income and Franchise Tax Returns
- Prepare State Estimated Tax Payments
- Maintain Tax Exemption Certificates

GENERAL

SPECIAL SKILLS:

SAP, Peoplesoft, Oracle, Lawson, JD Edwards, Great Plains, Hyperion, Infor, Ariba, Amazon Web Services (AWS), Azure Dev Ops, Blackline, Wallstreet, Sunguard, Reval, Revenue Recognition, RevPro, System Design Life Cycle (SDLC) Methodology, Back Office, Vertex (L, O, Q, Sales Tax Return, VRA), Taxware (SUT and Enterprise), Sabrix, Zytax, IFRS (International Financial Reporting Standards), FASB, IASB, GAAP, RWD Info Pak, Sarbanes-Oxley, COSO guidelines, COBIT framework, Project Management, Sharepoint, SQL, LSMW, Mercury Test Director, AMDOCS, ReadSoft, Corp Tax, Microsoft Excel, Word, Access, Project, Powerpoint, Visio

ACTIVITIES:

Americas SAP Users Group (ASUG) - Member
Vertex Users Group
SABRIX Advisor Program
Habitat for Humanity
National Association of MBAs

References Available Upon Request

JW Shepherd

- Houston, TX, US

Contact Information

- u7n-fki-quo@mail.dice.com
- 8327216866

Work History

Total Work Experience: 20 years

- **SAP** FICO / TAX (Indirect And Direct) / VAT / Document Elite ERP Consultants Of Texas, Inc.
Jan 01, 2003

Education

- **Bachelors** | BS in Accounting
- **Masters** | MBA in Finance
- **Masters** | MS in Information Systems

Skills

- erp tax: sales and use, vat, canadian, - 26 years
- indirect taxes and direct taxes - 26 years
- **sap** fi, ap , ar, gl , fica, - 26 years
- **sap** industry solutions: **oil &** - 26 years
- **sap** tax: vertex , sabrix onesource - 26 years
- tax compliance, tax reporting, - 26 years
- tax integration: sd, order to - 26 years
- erp systems: **sap**, oracle, peoplesoft, - 20 years

- **dart data archiving: sap, ilm**, - 12 years
- **ariba tax: sales and use tax**, - 10 years
- **dod: navy erp, army (imp), aerospace** - 10 years
- **taxcloud, mastersaf, mastertax**, - 9 years
- **global tax management : advanced** - 5 years
- **lcr dixon: vendorecon, spot report**, - 5 years
- **sap accelerator, tax accelerator** - 5 years
- **sap s4 hana fi and tax: 1 brownfield** - 5 years
- **scrum, azure dev ops, jira** - 4 years
- **treasury: banking, cash management**, - 15 years
- **mtd (making tax digital)** - 3 years
- **powerplan: powerplant asset accounting**, - 10 years
- **avalara: avatax, epicor tax connect**; - 9 years

Work Preferences

- Desired Work Settings: Remote
- Likely to Switch: True
- Willing to Relocate: False
- Travel Preference: 0%
- Work Authorization:
 - US
- Work Documents:
 - US Citizen
- Security Clearance: True
- Third Party: True
- Employment Type:
 - Part-time
 - Contract - Corp-to-Corp
 - Contract - Independent

Profile Sources

- Dice:
 - <https://www.dice.com/employer/talent/profile/6e4bd65162b1316934265c8b2e497e35>