Shari Ferrara Wallace

MANAGER



Responsive, straightforward, friendly, and dedicated, Shari Ferrara Wallace builds long-term professional and personal relationships with her not-for-profit clients. She gains a clear understanding of their programs and goals, enhancing her ability to assist them in audits and 990 tax return preparation and review.

Shari manages the entire audit process, from counseling on financial regulations and protocols, and conducting and reviewing audits, to preparing and reviewing not-for-profit and individual tax returns. Shari also works very closely with the National Academy of Arts & Sciences, tabulating and confirming the accuracy of all Emmy contests, and ensuring that ethical standards are met. She handles everything from auditing award voting tabulations, presenting results to various committees, and ensuring the accuracy of press releases, to preparing award winners' cards and envelopes, all within very challenging deadlines.

Shari is actively involved in training junior staff members at Lutz and Carr. She focuses on teaching analytical and logical approaches in addition to offering textbook training.

Professional Memberships

- American Institute of Certified Public Accountants (AICPA)
- New York State Society of Certified Public Accountants (NYSSCPA)

EDUCATION & CERTIFICATIONS

Certified Public Accountant (New York, 1996)

B.A., Queens College (1987)

SERVICES

NOT-FOR-PROFIT AUDIT

TAX
