

JOSHUA SCOTT, EA, MBA

EDUCATION

Bachelor's in Business Administration

Aug 2016

Finance and Accounting concentration

University of La Verne, La Verne, CA

Master's in Business Administration (MBA)

Jan 2021

Management and Leadership concentration

University of La Verne, La Verne, CA

Licenses and Certifications

IRS Enrolled Agent

FINRA Series 7 – General Securities Representative

FINRA Series 66 – Uniform Combined State Law

NC Life Insurance Agent

Security Industry Essentials (SIE)

National Tax Practice Institute Fellow

Leadership Greensboro Graduate '24

Tax Accounting & Real Estate

Modern Woodman of America, Greensboro, NC

Dec 2024- Current

Investment Advisor Representative

- Provide tailored financial planning solutions, integrating investment, insurance, and tax strategies.
- Assist clients in wealth accumulation, retirement planning, and risk management through comprehensive financial strategies.
- Leverage tax expertise to optimize financial plans, ensuring tax-efficient investment and insurance solutions.
- Cultivate and maintain client relationships by delivering ongoing financial education and personalized guidance.
- Utilize a holistic approach to financial services, cross-selling investment and insurance products to meet client needs.

Joshua Scott & Associates, LLC, Greensboro, NC

June 2023 – Current

Managing Partner/Enrolled Agent

- Provide comprehensive tax and financial planning solutions for individuals and businesses.
- Specialize in tax-efficient investment strategies, integrating financial planning with tax minimization.
- Offer IRS representation and tax resolution services, ensuring compliance and risk mitigation.
- Develop estate and legacy planning strategies, incorporating insurance and investment solutions.

Implement real estate-focused tax strategies, optimizing deductions and asset protection.

Internal Revenue Service (IRS), Greensboro, NC

September 2021 – June 2023
(40 hour wk)

Individual Taxpayer Advisory Specialist

- Advise taxpayers in meeting their federal obligations
- Counsel taxpayers on individual income, excise, and employment taxes
- Conduct interviews with pre-selected taxpayers to determine their tax situation, provide advice, and explain probable consequences of various courses of action open to taxpayers for the current and other tax years.
- Discuss basic tax law impact with tax practitioners and accountants, review books and records to gain an understanding of the taxpayer's financial status (cash/accrual basis)

United States Navy, USA

November 2010 – November 2013

Military Police

- Provided security and physical protection for service members.
- Trained fellow Sailors in security and shore patrol duties and served as a security advisor for squadron.
- Assist in crowd control and riot prevention.
- Operated military prisons on board ships and handled and cared for dogs that detect narcotics and explosives.
- Conducted waterborne security patrol and interdiction operations.
- Provide protective service to high ranking dignitaries and government officials.

Professional Affiliations

Junior Achievement of the Triad

Executive Board Member

Acting Treasurer (2024-2026)

North Carolina Society of Enrolled Agents (NCSEA)

Executive Board Member

Acting Treasurer (2025-2027)

Greensboro Chamber of Commerce

Partner and LG 2024 Alumni

Greensboro Regional Realtors Association

Affiliate Member

Keynote Speaker