

Rachel Ta

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EDUCATION

University of California, Berkeley - Bachelor of Arts in Economics Graduated May 2025

- **Involvement:** Project SMILE (Enrichment Coordinator), Vietnamese Student Alliance, Ascend Leadership
- **Affiliations:** Mind the Product, Rewriting the Code, Girls who Code, AnitaB.org, Women in Product
- **Skills:** Claude, Codex, Microsoft Excel, Copilot, Figma, Jira, SQL, HTML, R, I-9 Verification, Servicenow

WORK EXPERIENCE

PwC (Pricewaterhouse Coopers) July 2025 - Present

Private Tax Accountant

- Analyzed cross-team billing data to catch discrepancies, avoiding 1-2 day turnaround delays
- Owned 10-15 concurrent client relationships 1:1, driving 100% on-time delivery during peak season
- Avoided director-level billing rates up to 3.5x higher by taking ownership of ambiguous client issues

Private Tax Intern

July 2024 - August 2024

- Surfaced up to \$200K in billing discrepancies by analyzing out-of-scope charges across client billing reports
- Consolidated billing data sources into one streamlined report to cut senior review time by 50%
- Recovered thousands in client penalties by liaising directly with the IRS on clients' behalf to resolve notices

BEARS Region - HR Assistant

August 2022 - May 2025

- Built an Excel-based filter system to flag duplicate employee names across 500+ records, cutting verification time 50% and preventing misdirected bonus payouts
- Designed a triage process for walk-in issues, owning tickets 1:1 to cut resolution time to 15 minutes
- Designed an onboarding journey that ramped 2 new hires to full productivity in 2 months, down from 12

RippleMatch - Forward Deployed Product Manager

January 2022 - May 2022

- Drove a 90% post-offer retention rate by building trust with candidates 1:1 during the interview process
- Designed an evaluation rubric and structured interview journey to assess candidate fit and motivation
- Lifted candidate pass rate to 60% vs. a 45% program baseline by running structured interviews at scale

PROJECTS

Accounting Workflow Automation

May 2026 - Present

- Built a Claude agent to automate trial balance-to-workpaper mapping, targeting 20% faster rollforward
- Defined validation requirements to flag missed line items and reduce risk of IRS penalties
- Standardized reporting workflows using data validation logic to target 100% accuracy in check-figure review

K-1 Data Automation Project

May 2026 - Present

- Built an automated tracking system with Codex to process 400+ K-1 documents 35% faster
- Shipped automated K-1 intake monitoring, eliminating up to 18 hours of manual batch checks
- Defined the user journey for real-time K-1 tracking to eliminate multi-day delays in starting estimates