

# Travis Carlsen

Managing Partner at One Source Tax & Accounting Services

traviscarlsen@hotmail.com

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## Summary

Travis' combination of practical work experience, solid educational experience and knowledge of non-profit and for-profit business has prepared him to make great contributions to the businesses he works with. Having worked in top quality organizations, he understands the level of professionalism and communication required for long-term success in any field. Travis' background and professional approach will provide your organization with a highly productive partner.

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## Experience

### **Partner at One Source Tax & Accounting Services**

November 2012 - Present (1 year)

Our mission is to provide a comprehensive financial service and guidance in a wide range to match your business and financial needs.

*1 recommendation available upon request*

### **Owner/Managing Partner at One Source Tax & Accounting Services**

April 2011 - Present (2 years 7 months)

One Source, LLC is a full-service accounting firm serving all size businesses. We specialize in a variety of accounting services to help clients keep accurate financial records and reduce their tax exposure.

- \* CFO services
- \* tax preparation
- \* bookkeeping
- \* IRS correspondence
- \* corporate continuation
- \* business consulting
- \* audits

*12 recommendations available upon request*

### **President/Owner at North Central Properties LLC**

April 2007 - Present (6 years 7 months)

Research and acquire commercial and residential real estate. Service renters and maintain properties. Maintain and relay information to investors.

Research properties  
Acquire investors  
Manage properties  
Marketing

Day to day operations

*1 recommendation available upon request*

**Tax Specialist at Corporate Farmer**

November 2006 - April 2011 (4 years 6 months)

Prepare personal & Corporate tax returns

Tax year end planning for clients

IRS Correspondence:

Prepare all 1099 and W2 forms for clients

Research and respond to all IRS notifications

Sales & Marketing: Recruit, train and retain sales staff.

Develop and manage all marketing and sales programs

Work with sales staff to achieve sales goals

Research and prepare for sales meetings and trade shows

**Vice President at Boys & Girls Club of Camarillo**

January 2004 - October 2006 (2 years 10 months)

Served as liaison to the Boys and Girls Club Auxiliary, Community Leadership Council, foundations, contributors, and volunteers in the context of raising the necessary financial contributions to support the mission of the Boys & Girls Club: "To provide programs for young people between the ages of six and eighteen that will inspire them to realize their full potential as responsible and caring citizens."

Fund Development: Assisted in developing collaborative partnerships and relationships with corporate, private, and community donors to support a \$800,000 dollar budget; utilized local universities, colleges, and school assets; supported key community events, and disseminated membership information through newsletters and program brochures.

Developed annual resource development plan to help the Club increase funding

Solicited in kind donations and sponsorships for events, as well as annual campaign funds

Designed and conducted presentations to management and staff, service groups, volunteers and potential donors

Administration of grant program including meeting with foundations, research, writing, budgeting, implementation and data analysis

*6 recommendations available upon request*

**Director of Operations at Boys & Girls Club of Camarillo**

October 2002 - January 2004 (1 year 4 months)

Provide high-level program coordination support for the Boys & Girls Club of Camarillo that requires a high degree of accuracy, sensitivity and follow-up on processing documents and working with employees while meeting vigorous timelines.

Human Resources: Responsibilities require assisting employees in their development and ensure programs are organized and well developed.

Liaison between President/CEO and Program staff.

Supervision, orientation and evaluation of all program staff.

Facility Usage and Maintenance: Responsibilities for facility maintenance, facility rental and management of vendors.

Created and implemented standard operating procedures

Manage all building and system upgrades and maintenance

Analysis and management of vendors

Contract and lease management

Manage all necessary rental paperwork

Management and maintenance of organizations technology

Programs: responsibilities require program development and ensure programs are organized and implemented.

Train staff in the development and implementation of programming

Complete program evaluations (Commitment to Quality)

Assisted Boys & Girls Clubs of American on program development

*1 recommendation available upon request*

### **Director of Operations at Boys and Girls Club of Green Bay**

August 2001 - October 2002 (1 year 3 months)

Oversee all programs, human resources and facility operations. Provide leadership and motivation for 60 staff members including employee evaluations, program evaluations and all human resource activities.

### **Program Director at Boys and Girls Club of Green Bay**

January 2001 - August 2001 (8 months)

Special Events:

Worked with staff, volunteers and donors in order to organize, implement, and evaluated all Club youth events

Coordination of over 20 staff and 50 volunteers

Responsible for gaining sponsors to underwrite all costs

Volunteer Coordination:

Responsible to recruit and retain Club volunteers

Created and implemented volunteer policy and procedures

Managed all volunteer recognition

Parent Liaison:

Dealt with all discipline issues and was the Club liaison with all parents

### **Education and Career Development Director at Boys & Girls Club of Green Bay**

August 2000 - January 2001 (6 months)

Created and implemented all educational programs for youth ages 6 through 18. Worked with teens in career and secondary education exploration. Took the lead in partnering with local business and colleges to create a career exploration program. Supervised two staff members including applying for and receiving funding for an Americorp Vista volunteer. Utilizing local elementary schools to create a free tutoring program for local youth.

*1 recommendation available upon request*

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## Certifications

### **Life Insurance**

State of Iowa      October 2011

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## Organizations

**Ankeny Chamber of Commerce**

**Urbandale Chamber of Commerce**

**Ankeny Young Professionals**

**Pleasant Hill Chamber of Commerce**

**Urbandale GenYP**

April 2012 to June 2013

### **Business Links**

### **Executive Connections**

**Ankeny Leadership Institute**

Member

September 2013 to Present

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## Volunteer Experience

**Volunteer at Mosaic**

2012 - Present (1 year)

Mosaic provides a life of possibilities for individuals with intellectual disabilities. They help people define their own happiness. We support them and empower the pursuit of their goals.

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## Skills & Expertise

**Tax Accounting**  
**Business Strategy**  
**New Business Development**  
**Tax Preparation**  
**Management**  
**Leadership Development**  
**Corporate Tax**  
**Agribusiness**  
**Commercial Real Estate**  
**Life Insurance**  
**Non-profit Program Development**  
**Non-profit Administration**  
**Non-profit Board Development**  
**Board of Director experience**  
**Auditing**  
**Non-profit Fund Development**  
**Financial Accounting**  
**Sales**  
**Marketing**  
**Financial Coaching**  
**QuickBooks**  
**Property Management**  
**Internal Audit**  
**Board of Directors**  
**CPA**  
**Strategic Planning**  
**Tax**  
**Accounting**  
**Training**  
**Coaching**  
**Sports Coaching**  
**Budgets**  
**Leadership**  
**Small Business**  
**Nonprofits**  
**Management Consulting**  
**Project Planning**  
**Human Resources**  
**Program Management**  
**Policy**  
**Time Management**  
**LLC**  
**Recruiting**

**Business Planning**  
**Event Management**  
**Sales Management**  
**Start-ups**  
**Financial Analysis**  
**Strategic Financial Planning**  
**Mergers & Acquisitions**

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## Education

### **University of Northern Iowa**

1997 - 2000

Activities and Societies: University of Northern Iowa football team

### **Wartburg College**

1995 - 1996

Activities and Societies: Basketball

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## Interests

Volunteer at MOSAIC,  
Coaching,  
Business

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## 22 people have recommended Travis

"Working with Travis is always a pleasure. His expertise and professionalism offers high quality results and confident clients."

— **Muriel Fremy**, *Designer/Gemologist/Owner, Fine and Precious Jewelry/MiMi Gems*, reported to Travis at One Source Tax & Accounting Services

"Travis can provide the financial insights crucial to everything from personal tax planning to in-depth business planning. He provides insightful and innovative solutions based on practical and professional experiences that translate into bottom-line results."

— **Matt Hurd**, was Travis's client

"Travis is a highly ethical business professional, and consistently places the needs of the customer first."

— **Brian Schult**, *Risk/Control Audit Manager, FBL Financial Group, Inc.*, was with another company when working with Travis at One Source Tax & Accounting Services

"We looked to change accountants in late 2012 and I had met Travis through the Ankeny Chamber. He is very easy to talk to and gives you great advice on how to handle the tax and accounting issues you may encounter. Personal or business Travis and One Source are the ones to choose for tax and accounting services!"

— **Jeremy Zinn**, was Travis's client

"I first discovered Travis when I was contemplating opening my own law office. I compiled all of my financials and projections before meeting with Travis. When I sat down with Travis he looked through everything, asked detailed questions, provided advice as to where I should increase and decrease my projections, and provided insights and recommendations on moving forward. Travis is an incredibly personable individual, who provides superior work at an outstanding value. I would recommend him any individual who is looking for tax and accounting services."

— **John Hodges**, was Travis's client

"I found Travis to be very honest and hard working always having the end goal in mind. I highly recommend him for financial advice and he is always there to share his knowledge and expertise."

— **William Capelle**, *Vice President, American Pride Industrial Equipment*, was with another company when working with Travis at One Source Tax & Accounting Services, LLC

"I switched accountants after 5 years with the same company. I had no major complaint with the previous company, but upon meeting Travis and listening to him explain things he just simplified everything for me. Not to mention I saved money and received more on my return! I would highly recommend him to anyone, especially if you run a small business. He works all throughout the Midwest so don't hesitate to contact him!"

— **Ole Olson**, was Travis's client

"Travis is very upstanding and reliable. He looks to go above and beyond to take care of his clients and works diligently to ensure the best results possible in each situation."

— **Thomas Stoops**, *Cosmetologist, Salon Bliss*, was with another company when working with Travis at One Source Tax & Accounting Services, LLC

"I have known Travis personally and professionally for well over 10 years. I see Travis as a very dedicated individual who strives to exceed his own expectations with every task he creates for himself. As a friend he is one I can count on and in business the service and outcome would be no different. I'd strongly recommend at least discussing finance options with Travis and One Source - and see what he can do for you."

— **Brian Moussalli**, *Vice President, DES Franchise, Inc.*, was with another company when working with Travis at One Source Tax & Accounting Services, LLC

"Travis is capable and competent. He has always carried himself in a professional manner when working with mutual clients. I trust Travis with my clients and would highly recommend him. Innate in him is a business sense that always places the client first. His affect is a mix of knowledge, professionalism and humor."

— **Mike Hobbs**, *General Manager, Liewen Law*, was with another company when working with Travis at One Source Tax & Accounting Services, LLC

"I have had the pleasure of working with Travis and getting to know him and his style of work. He is very innovative, organized and efficient. He cares about helping his clients in a way that leads them to prosper with their business and personal finances. He understands that he will be more successful by educating and tailoring his approach to his clients needs so that it is a win-win for all parties."

— **JoAnn Robbins**, *Agent, Farm Bureau Financial Services*, was a consultant or contractor to Travis at One Source Tax & Accounting Services, LLC

"Travis has a unique way of communicating through details and difficult information in a way that is clear, concise, and easy to understand which can give ease of concerns that his clients may have, which is a unique skill. Travis is very energetic, creative, and forward thinking, which would be an asset for anybody that is requiring not just current tax and accounting services, but for anybody that is looking for tax and accounting planning strategies for future growth. I would highly recommend Travis for your business relationship."



— **Tony Buhr**, *Branch Manager, Manpower Inc*, was with another company when working with Travis at One Source Tax & Accounting Services, LLC

"Really impressed with Travis and One Source, especially that he works with you throughout the year instead of simply at tax time. Great guy - highly recommend!"

— **Beth Van Zee**, was Travis's client

"Travis was a great person to work with, he always delivered what he said and always on time. I would be happy to work with him in any avenue he would pursue."

— **Brook Boehmler**, was Travis's client

"I don't have the dates but Travis worked for several years as assistant to the CEO of the Camarillo Boys & Girls club. I as a Board member and officer during his entire employment. Travis was very personable, worked well with others and never balked at an assignment. During his last 2 or 3 years he did most of the work that should have been done by the CEO and never complained. Travis had already made plans with family, etc. to move back to his home area otherwise he would have been our new CEO. I feel that Travis is extremely capable and dedicated to his job. I recommend him highly. If he were to return to Camarillo we would have to find a place for him. He was highly regarded by all of our Board members and we regretted losing him. John T. Bailey, Past President ACamarillo Boys & Girls Club Camarillo, California 93010"

— **John Bailey**, was Travis's client

"Travis is a very responsible and does quality work. He is dedicated and has good work habits."

— **Greg Glover**, *SVP & Regional Manager, City National Bank*, was with another company when working with Travis at Boys & Girls Club of Camarillo

"Travis will do well in any position where he has contact with people. Travis is a people person and sitting behind a desk is not what I would consider Travis's strengths. Travis has the ability to create relationships with everyone he runs across because of his genuine caring for others."

— **Bob Taylor**, *Realtor, Keller Williams Realty*, was with another company when working with Travis at Boys & Girls Club of Camarillo

"Which would you rather choose for a prospective colleague: one who is a great motivator, a team player and a loyal, trusted friend? Or one who thinks outside the box, marches to the beat of a different drummer, and gets things done? Fortunately, if you have selected Travis, you don't need to make that choice because he embodies both arenas. He simply is the best."

— **E. David Migocki, MSW, PhD**, *Doctoral Program Director, Emperor's College of Traditional Oriental Medicine*, was with another company when working with Travis at Boys & Girls Club of Camarillo

"I was a member of the Board of Directors of the Camarillo, CA Boys and Girls Club for over 27 years.

Travis joined the staff during a period of transitions of multiple Club Presidents. He provided continuity of programs during a turbulent time while designing and executing events and activities of high quality for kids spanning the whole range of ages being served. He was the "go-to" person whenever there was an opportunity to reach out to the community and he never declined a request for help ...his answer was always..."we can do it". We were sorry to see him located out of our area."

— **Sol Chooljian**, was Travis's client

"I had the opportunity of working with Travis, as both a vendor and a Board member, when he was with The Boys & Girls Club of Camarillo. They were trying times and Travis was a rock. He did a great job with the staff, the board and most important - the kids."

— **Scott Harris**, *President, Mustang Marketing*, was a consultant or contractor to Travis at Boys & Girls Club of Camarillo

"Travis has an affect intrinsic and manifest in his commitment to the clients he serves. It has been my great privilege to know Travis and to have worked with him over the years. In every situation involving my company's promotion of public opinion, Travis was exemplary. My only complaint, he lives in Iowa now and not So. California."

— **Mike Hobbs**, *President, Mortech Financial Group*, was with another company when working with Travis at Boys & Girls Club of Camarillo

"During my time at the Boys & Girls Club of Green Bay, I had the opportunity to work with Travis directly on day to day projects and activities. Travis demonstrated excellent work ethic and commitment to his job and has on several occasions gone above what was expected of him in his duties. Travis has a terrific personality that blends well with all types of people. He communicates effectively, professionally and clearly at all levels of discussion. I place high recommendation on Travis and his ability to get the job done well. Thank You, Alex Vigil"

— **Alex Vigil**, *Program Director / Building Manager, Boys & Girls Club Green Bay*, managed Travis at Boys & Girls Club of Green Bay

[Contact Travis on LinkedIn](#)