TAYLOR RILEY

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Technical leader with 15 years in tax software who builds production systems and leads the teams that ship them. Currently running a 28-person federal tax development organization across two major product lines (TaxAct, Drake), managing three managers and owning the full lifecycle from IRS regulation interpretation through calculation engine development to e-file certification. Built and deployed AI-powered development tooling—including custom MCP servers, code intelligence platforms, and automated triage systems—that fundamentally changed how the team works. Looking for a Director or VP-level role where I can pair deep regulated-industry expertise with hands-on technical leadership to drive platform modernization and AI adoption at scale.

PROFESSIONAL EXPERIENCE

Senior Manager, Federal Tax Development | **Taxwell** | Remote   *2023 – Present*

Taxwell owns TaxAct and Drake Tax, serving 5M+ individual and professional tax filers. Federal Tax Development owns all federal form calculations, e-file schemas, and IRS compliance across both platforms.

- **Organization Leadership:** Direct a 28-person cross-functional org (3 managers, 2 senior ICs) responsible for 100+ federal tax forms across two codebases, two product families, and a multi-year engine consolidation initiative.
- Consolidated two previously separate tax development departments into a single unified team, establishing the career ladder (Analyst I through Principal), writing all four job descriptions, and creating individual development plans for direct reports.
- Promoted a senior analyst to Federal 1040 Manager and navigated a sensitive role transition moving a team lead to a state tax principal position—both executed with zero attrition or disruption.
- **AI Platform Innovation:** Architected and personally built a code intelligence platform (Python, FastMCP, SQLite FTS5, PyQt6) that indexes 63 repositories, 660K+ calculations, and 1.5M+ cross-references into a 2 GB knowledge graph with 37 MCP tools—83 commits over 6 days.
- Created a 150-file AI documentation system that eliminated LLM fabrication of proprietary DSL syntax—previously the single largest source of wasted developer time when using AI tools. System includes compiler-extracted token validation, 16 automated checks, and a fabrication linter running in CI.
- Built two additional MCP servers (TypeScript) wrapping the internal compiler and regression test harness, closing the loop on a fully AI-assisted write-build-test-analyze development cycle.
- Championed enterprise Claude adoption, secured pilot access for the team, and integrated AI Builder into 3 Power Automate flows for ticket triage, email classification, and daily operational recaps.
- **Data-Driven Operations:** Built 6 production Power BI dashboards from scratch (HappyFox, ADO Analytics, ATS Reporting, Federal Readiness, FormsTracker, TY25 Readiness), replacing manual spreadsheet processes with real-time self-service reporting.
- Identified and drove SLA breach rate from ~38% to ~5.6% through dashboard visibility. Surfaced workload concentration risk (top 5 analysts handling 69% of tickets) that led to redistribution and process changes.
- Designed and deployed 7 Power Automate flows automating ticket recaps, critical-issue triage, email routing, deployment notifications, and change request monitoring.
- **Platform Modernization:** Led the strategic analysis and sprint planning for the PowerBASIC-to-MathMaster DSL engine consolidation—the department's largest multi-year initiative. Selected 1041 (Fiduciary) as the pilot product and personally converted 9+ complex IRS forms through full-lifecycle migration.
- Drove Schedule H regression diffs from initial failures to 0 diffs over 4 rounds. Identified and fixed a Form 2441 calculation bug affecting ~3,000 e-filed returns with up to $700/return in missed credits—deployed to production within 48 hours.
- Own the weekly executive briefing (VP Tax Dev, CTO, peer Directors), producing data-backed slide decks with quantified metrics and actionable recommendations—shifting the conversation from status reporting to strategic advising.
- Redesigned the Drake patching cadence from daily releases to twice-weekly, cutting context-switching by ~60% and freeing ~3–4 hours/week. Initiated cross-training to eliminate single-point-of-failure risk in the release process.
- Reduced ADO OData API calls from 100+ to ~5 per refresh by rewriting the Power Query architecture, cutting dashboard refresh time by ~80%.

Principal Tax Analyst | **TaxAct (now Taxwell)** | Remote / Cedar Rapids, IA   *2011 – 2023*

Individual contributor and senior technical expert across all TaxAct product lines—individual, corporate, partnership, estate, and trust returns.

- Designed calculations, functionality, UX flows, and XML e-file schemas for TaxAct's full suite of consumer and professional tax products.
- Launched revenue-generating products including All-Inclusive Bundle, TaxAct Complete, and E-File Concierge. Owned products like TaxPlan, Refund Booster (W-4 calculator), and Tax Calculator.
- Built and deployed features with direct regulatory impact: e-file for amended returns, PayPal integration, Economic Impact Payments (EIP), and California Health Care Mandate compliance.
- Implemented fraud and security measures for IRS, state agencies, and internal systems. Maintained relationships with IRS and state departments through working groups and industry conferences.
- Analyzed user behavior and product performance using Google Analytics, Amazon Athena, Splunk, and Tableau to drive roadmap decisions.
- Contributed to hiring, training, and mentoring across the TaxAct organization, laying the foundation for the management role that followed.

TECHNICAL PROFICIENCIES

Languages & Frameworks: Python, TypeScript/Node.js, PowerShell, DAX, Power Query M, SQL, PowerBASIC, MathMaster DSL, HTML/CSS/JS

AI & LLM Tooling: Model Context Protocol (MCP) server design, Claude Code (skills, hooks, CLAUDE.md), AI Builder, prompt engineering, RAG architecture

Platforms & Infrastructure: Azure DevOps (Git, Pipelines, OData Analytics), Power BI, Power Automate, AWS S3, SQLite/FTS5, Jira, HappyFox, Snowflake, Splunk

Development Tools: FastMCP, PyQt6, ReportLab, Apryse SDK, zod, Git/SVN, VS Code

Domain: Federal tax law (individual, corporate, partnership, fiduciary, exempt), multi-state tax (CA, OH, MI, AL, DC, CO, IL, NM), IRS e-file schemas, ATS certification, tax engine architecture

COMMUNITY

VITA Volunteer — Prepared individual income tax returns for lower-income taxpayers. IRS-certified.

EDUCATION

Master of Accounting   St. Ambrose University
BBA, Accounting & BBA, Finance   University of Iowa