

# Anthony Garrett

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Product manager and licensed CPA with deep expertise in automating financial workflows. Built and deployed LLM-based tools that significantly reduce hours spent on repetitive accounting tasks. Track record of shipping products that solve real pain points for finance teams, including a platform acquired by American Estate and Trust. Combines hands-on technical skills (Python, SQL, LangChain) with domain knowledge in expense categorization, financial reporting, and accounting standards.

## WORK EXPERIENCE

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### Deal Advisory and Strategy Associate – KPMG

2024 – Present

#### *Applied AI & Internal Product Development*

- Build and Deploy LLM-based tools using KPMG's API infrastructure and frameworks like LangChain, reducing associate hours needed by up to 40% on fixed-fee engagements.
- Identify automation opportunity in transaction classification workflows where associates manually categorized transactions from unstructured description fields, repetitive work well-suited for LLMs.
- Serve as both technical lead and project manager for AI initiatives, deploying solutions across multiple client engagements to accelerate delivery timelines.

#### *Accounting Advisory Services*

- Serve as subject matter expert on digital assets, leading stablecoin accounting initiatives and authoring technical memoranda that inform firm-wide guidance.
- Authored comprehensive stablecoin memorandum for a leading global issuer, detailing end-to-end accounting from issuance to redemption under ASC 606, ASC 840, and ASC 720.
- Developed ASC 805 purchase accounting memoranda for buy-side clients in acquisitions ranging from \$500M to \$2B, including opening balance sheets and purchase price consideration analysis.

### Product Manager – Defi Steward

2022 – 2023 | *Acquired by American Estate and Trust*

- Joined as first hire to lead product development for a platform enabling financial advisors to execute cryptocurrency transactions on behalf of clients, growing to 30–40 active clients with over \$1M in managed digital assets.
- Discovered through user retention data that the custodial product (crypto in tax-advantaged retirement accounts) achieved 100% customer retention vs. 5–10% for the non-custodial on-chain product. Pivoted roadmap to double down on the custodial offering.
- Key learning: Users adopt products that solve real pain points (tax advantages), not blockchain products that are technically impressive. This insight drove the product strategy that led to acquisition.
- Designed UI/UX workflows supporting both off-chain execution (Coinbase API) and on-chain execution (Ethers.js), working across Vue, Laravel, Python, and SQL. Managed a small development team.

### Course Developer & Product Manager – Interaxis

2021 – 2023

- Authored CPE curriculum covering blockchain fundamentals, DeFi mechanics, and digital asset accounting for non-technical financial planning professionals.
- Managed the development of PlannerDAO's on-chain certification platform, enabling course completion verification through fiat on-ramping, token swapping, and liquidity provision.

## CREDENTIALS & SKILLS

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### Certified Public Accountant (CPA) – Washington State, License #59250

- Passed all four sections of the Uniform CPA Examination on first attempt (FAR, AUD, REG, ISC)

**Technical:** Python, Typescript, SQL, LangChain, Viem, API integrations, LLM application development

**Domain:** Financial reporting (ASC 805, 606, 840, 720), SEC compliance, M&A due diligence, Stablecoins, DeFi

## EDUCATION

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### Gonzaga University – Spokane, WA

Bachelor of Business Administration, Accounting – Cum Laude | May 2023