

FIRST NAME LAST NAME, CPA

LinkedIn URL

email@gmail.com

City, State

Phone

PROFESSIONAL LEADER IN ACCOUNTING

Keen expert with proven ability to successfully manage all accounting responsibilities related to budgeting, auditing, strategic planning, and compliance. Demonstrates excellence in leadership and communication by enhancing employee training and improving work flow; thus resulting in higher levels of productivity while preserving a strong culture of integrity. Proficient in coordinating all efforts related to software change and integration. Strong technical aptitude in Accounting Systems and new software implementation. Excellent track record of adapting to changes and bring forth solutions that retain profitability, reduce costs, and increase overall stakeholder satisfaction.

CORE COMPETENCIES

**PROFIT-DRIVEN LEADER ▪ CAPITAL BUDGETING ▪ FINANCIAL ANALYSIS ▪ GAAP & SOX COMPLIANCE ▪ INVENTORY ACCOUNTING ▪ TRAINING & DEVELOPMENT
BUDGET MANAGEMENT ▪ COST SAVINGS ▪ PROCESS CONTROLS
STRATEGIC SOURCING ANALYSIS ▪ FORECASTING**

KEY ACHIEVEMENTS

- Grossed 3X annual salary for CPA firm each year.
- Confidently stepped into leadership position as interim firm manager during peak season.
- Played key role in successful implementation of new tax accounting software by providing technical training and assistance to team members.

PROFESSIONAL EXPERIENCE

Senior Certified Public Accountant

June 2019 to Present

Organization Name

City, State

- Productively managed branch as interim firm manager remotely, and in-person, by leading 5 accounting staff and 2 office workers through peak tax season.
- Strategically manage workload of >300 accounts and grossing 3X annual salary each year.
- Eagerly contributed to continuous improvement initiative of implementing new tax software by acting as main point of contact for technical assistance.
- Provide training, mentorship, and direction to interns on special projects such as updating depreciation schedules in new company software and close out of retained earnings.
- Conduct financial analysis and interpretation by auditing general ledger details, analyzing gross profit, reviewing expenses, examining inventory counts, calculating loan balances, and more.
- Analyze cost inputs with clients to identify ways to reduce costs and maximize yields.
- Rigorously maintain quality and integrity of firm's output by reviewing bookkeeping work of peers and by ensuring all data and numbers are recorded accurately.
- Audit health districts by evaluating grants to ensure organizations are adhering to compliance standards and maintain eligibility to receive financial aid.

Certified Public Accountant

September 2015 to April 2019

Organization Name

City, State

- Actively collaborated with team to reach goal of processing >2K tax returns annually.
- Meticulously performed audits for various organizations, including manufacturing businesses, by reviewing balance sheets, analyzing gross profits, and assessing analytical procedures.
- Diligently performed count inventory audits with a high level of integrity and attention to detail.
- Created and maintained depreciation schedules and capital expenditures in order to reduce tax liability.

VOLUNTEER WORK

Volunteer Treasurer

January 2020 to Present

Organization Name

City, State

- Strategically navigated church through challenges of lower offerings during covid by adjusting budget and expenditures in order to mitigate revenue loss and earn profit in FY22.
- Collaborated with co-treasurer to research, apply, and obtain a PPP Loan during pandemic, which provided over \$40k in relief funding.
- Enhanced safeguarding of cash counting by adding a security camera to monitor counting of offerings, implementing security footage observation, and requiring dual signatures.
- Partnered with budget committee to review profit & loss statements, find opportunities to cut costs, and prioritize allocation of funds in order to develop and modify annual budget.
- Compile and present historical trends and quarterly forecasts to church leaders.

EDUCATION & CREDENTIALING

Certified Public Accountant, American Institute of Certified Public Accountants
2015 – Present

Master of Science in Accounting, Name of University, City, State
June 2014 – August 2015

Bachelor of Arts in Accounting & Management, Name of University, City, State
August 2011 – May 2014

TECHNICAL PROFICIENCIES

- Acrobat
- Acrobat Reader
- Asset Keeper
- Easy Accounting
- Engagement
- File Cabinet
- G-Suite
- Lacerte
- Microsoft Office Suite
- ProSystems FX
- Quickbooks Desktop
- Quickbooks Online
- Quicken
- Ultra Tax