

# JESSICA CLAIRE

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## SUMMARY

Highly skilled controller with expertise guiding organizational growth through robust financial strategies and management. Accomplished in recognizing operational inefficiencies and risks and improving internal controls, standards and procedures. Over twenty-year background growing organizations, including professional service entities.

## SKILLS

- Internal controls development
- Month-end and year-end closings
- Financial strategy management
- US GAAP proficiency
- Executive leadership advisement
- Profit and loss management
- Management accounting
- Financial forecasting
- Balance sheet management
- Payment disbursement
- Corporate strategic planning
- Financial document review
- General ledger accounting
- Public Accounting
- Microsoft Office
- Teambuilding
- Payroll policies and procedures
- Managing commission structures
- Interpersonal and written communication
- Billing
- Daily payroll activities

## EXPERIENCE

### Consultant, 11/2021 - Current

#### Fotheringill & Wade Llc – Lafayette, CO

- Helped the current administration get the city's books and records in order to allow for the auditors to begin a two-year audit.
- Suggested policies and procedures to maintain integrity and efficiency.
- Verified general ledger balances through reconciliations and tracing across governmental funds.
- Researched and analyzed operations to ascertain detailed client needs.
- Coordinated with appropriate departmental staff members to assign proper procedures for project implementation and strategic aim.
- Broadened improvement initiatives by troubleshooting problems and recommending corrective actions.
- Documented research findings and prepared polished reports highlighting results and potential improvement strategies.
- Reviewed diverse organizational problems to assess concerns with workflows, communication and cost controls.
- Evaluated internal systems and prepared training initiatives to mitigate ongoing problems.
- Assessed employees through on-site observation and interviews to determine strengths and weaknesses in work performance, methods and team functions.

### Controller, 04/2018 - 11/2021

#### 4Over – Phoenix, AZ

- Oversaw accounting personnel, receivables, payables, collections, cash management, and 401(k).
- Maintained payroll for the entities through a third-party processor.
- Prepared internal financial statements.
- Implemented policies and procedures to maintain or tighten internal controls.
- Procured monthly manufacturing rebates.
- Maintained and facilitated investment strategies.
- Revamped the sales tax process for reporting, compliance, and client management.
- Received a "no adjustment" sales tax audit for the previous three-year period.
- Reported directly to the President, provided numerous financial analytics and reports to management on a weekly, monthly, quarterly and annual basis.
- Provided the monthly general ledger closing, annual general ledger closing, and worked with the outside CPA firm to facilitate the year end reporting and tax returns.
- Reviewed account reconciliations and journal entries and resolved discrepancies to maintain record and account accuracy.
- Oversaw month-end closing process, prepared financial statements and managed advanced reconciliations.
- Maintained general ledger and chart of accounts, performed complex accounting functions such as journal entry preparation, account analysis, balance sheet reconciliation and preparation of financial statements.
- Oversaw financial reporting, accounts payable and receivable, asset coordination, account management and budgets.
- Prepared and presented operational reports to senior management and executive teams.
- Administered payroll for employees and oversaw corporate payroll reconciliation and tax activities.
- Designed and formatted financial reports for internal and external users.
- Created internal controls and corrective actions to reduce risk or deficiencies.
- Prepared variance analyses, supporting and documenting accounting activities.
- Reorganized finance and accounting departments to improve efficiency and cut excess spending.
- Updated billing procedures to improve overall efficiency and reduce accounts receivable.
- Managed cash flows to optimize year-end tax benefits.
- Prepared and presented annual fiscal and business plans.

### Manager, Tax Preparer, 08/2005 - 04/2018

#### Baumann & Company, PLLC – City, STATE

- Prepared tax returns for a variety of clients: individuals, S-Corporations, LLCs, C Corporations.
- Preparation of quarterly, annual financial statements.
- Involved in a multitude of special projects for clients: facilitating a tax audit, filling in as a controller due to personnel loss, provide analytics to be used in accessing a merger or acquisition, software conversions, consultant to government entities.
- Assigned tasks to associates to fit skill levels and maximize team performance.
- Stored copies of completed returns and related documents according to company procedures and business regulations.
- Determined clients' eligibility for tax credits, abatements or deductions through careful research and oversight.
- Supplied detailed tax documentation needed to submit accurate corporate and individual returns.
- Finalized and processed paperwork with local, state and federal government authorities.
- Responded to state and federal tax notices by preparing written responses or tax return amendments.
- Informed clients of potentially beneficial products and services, resulting in additional business opportunities.
- Analyzed information and assessed liabilities and deductions according to relevant tax code.
- Liaised between clients and tax authorities such as IRS representatives.
- Produced work papers and lead sheets, tax projects and payment estimations.

## EDUCATION AND TRAINING

### Bachelor of Science: Accounting, 12/1997

#### Southeastern Louisiana University - Hammond, LA

Cum laude graduate

### Master of Business Administration: Finance Concentration, 12/2004

#### University of New Orleans - New Orleans, LA

- Graduate Student of the Year Recipient

## CERTIFICATIONS

- Certified Public Accountant, 2002