Philip Niedzwiadek, CPA
http://Niedzwiadek.ca/

OBJECTIVE
To leverage different data sources and technical solutions to optimize financial and operational performance, with a particular interest in both fintech and blockchain technologies.

PROFILE
- Active interest in using information systems in a creative manner for productivity purposes and a strong desire to learn about enterprise information systems; actively learning and improving my proficiency with Python, SQL, JavaScript and Solidity to better understand how to better leverage large amounts of data from the internet of value
- Technically proficient with Microsoft Word, Excel, Power Point, Access and Dynamics 365 F&O; Google Docs, Sheets, Slides, Drive; Various SAP Modules, Caseware, Simply Accounting, QuickBooks, Sage
- Outstanding problem solving, analytical skills, attention to detail and peer coaching, as exhibited by work experience as a public accountant at Frouin Group in a financial reporting role and senior financial and systems analyst at Conference Board of Canada
- Proven leadership, teamwork, interpersonal skills in academic, recreational, office and lifesaving settings with individuals of all ages
- Fluent in English and Polish, proficient in French (high school, extended level); proven through customer service experience and strong desire to continue learning French by practicing in a professional French speaking work environment
- Strong interest and curiosity in the potential for blockchain technology and crypto-assets in economic and enterprise level applications specifically related to accounting and supply chain management

EDUCATION

Chartered Professional Accountant (CPA) Designation   **Sept 2018**
Specialization in audit and performance management

Bachelor of Commerce, Honours, concentration in Accounting   **Sept 2010 - Dec 2015**
Carleton University, Sprott School of Business, Ottawa, Ontario

WORK EXPERIENCE

Virtual Chief Financial Officer (CFO)   **Jun 2021 - Present**
Westboro Photonics, Ottawa, Ontario
- Overseeing and making all adjusting entries and corrections to the bookkeeping records
- Preparation and analysis of amortization, prepaid and accrued expense entries
- Preparation of monthly financial analysis to determine job profitability, and preparation of internal financial statement packages for owners to analyze variances and forecast discrepancies
- Preparation and subsequent correspondence with the Public Accounting firm regarding fiscal year end preparation
- Coordination with owners to prepare an annual budget each fiscal year
- Providing ad-hoc accounting and financial advice
- Lead the setup of new financial projects, procedures and/or financial reports, when necessary

Senior Financial Analyst / Systems Analyst   **Apr 2021 - Present**
Conference Board of Canada, Ottawa, Ontario
In addition to the duties from my prior position, I was also tasked with:
- Creating regular revenue reporting to show profits and losses over each period
- Analyzing financial data to find trends and patterns among current and pipeline research contracts to determine where new strategies should be implemented to increase profits
- Meeting with department heads and organization executives to plan strategies and brainstorm ideas to manage revenue maximization, expense reduction, and to deliver overall better customer content and experiences
- Executing organizational strategies and values regarding daily operations and long-term strategic operations
- Leveraging existing data and correspondence with management to create forecasts portraying projected revenues and associated research labour hours
- Using my prior public account experience to recognize federal, provincial and local tax and accounting compliance matters

Corporate Financial Analyst / Systems Analyst   **Jul 2019 - Present**

Conference Board of Canada, Ottawa, Ontario
- Prepare yearly budget, monthly forecasts and cash flow analyses for the corporate departments then following up monthly with financial reports, variance analyses and a review of KPIs; monthly risk and scenario analyses were included after the COVID-19 outbreak
- Supporting financial month end and year end audits by validating departments' monthly closure by creating and reviewing entries (accruals, adjustments and fixed asset depreciation) and preparing account reconciliation on a monthly basis for specific accounts
- Closing out our Niagara satellite office in the wake of the COVID-19 economic downturn by recognizing remaining project revenues, resolving remaining liabilities, reconciling deferred revenues, writing-off remaining assets and coordinating delivery of remaining records and assets back to the Ottawa head office
- Lead the weekly integration of ERP (MS D365) and CRM systems (iMIS) and troubleshoot integration errors
- Leading my team in requirements gathering for a new CRM system and Financial Planning and Analysis (FP&A) tool, and currently leading the implementation for the FP&A tool
- Test and validate MS D365 improvements in the testing environments and ensure that they have been transferred to production successfully
- Assist in leading the finance team in executing the semi-annual MS D365 Finance & Operations ERP upgrade
- Identify issues and implement improvements to streamline accounting processes, leading to system design changes

Senior Staff Accountant   **Jan 2017 - Jun 2019**

Frouin Group Professional Corporation, Ottawa, Ontario
- Apply a general knowledge of Canadian GAAP (ASPE & ASNFPO)
- Using Caseware to complete notice to reader compliance engagements, review engagements and audit engagements from start to finish
- Reconciling accounts in every accounting cycle, correcting errors and misstatements, and following up with clients of discrepancies
- Completing personal, corporate and sales tax returns, and maintaining and referencing the working paper files
- Performing management inquiry, analytical procedures, and a variety of audit testing for review and audit engagements
- Peer coaching sessions for completion for notice to reader engagements, corporate tax filing and personal tax filing

Bookkeeper   **Jun 2016 - Dec 2016**

Laurier Optical, Ottawa, Ontario
- Reconcile and post journal entries for daily sales and bank deposits in Sage accounting software
- Researching and complying to CRA sales tax regulations to thereafter calculate and file HST/GST and QST returns
- Performing bank reconciliations using Sage accounting software and following up on any discrepancies
- Keeping well organized electronic and physical records for future financial audits

Translation Manager   **May 2016 - Aug 2016**

Osmosis, Online Medical Learning Start-Up
- Corresponding with international medical translators to translate subtitles for YouTube and WikiMedia videos
- Posting subtitles in foreign languages to YouTube videos and WikiMedia videos
- Posting videos with foreign language Wikipedia pages on YouTube

Compliance Officer   **May 2013 - Aug 2014**

Debt Management Call Center, Ottawa Technology Center, Canada Revenue Agency, Ottawa, Ontario
- Educate the taxpayer through a service oriented rehabilitative approach in order to obtain good filing and payment habits in the future
- Arrange for the filing of any outstanding GST return(s) and obtain payment in full of any outstanding or anticipated balances
- Recognize accounts requiring complex actions and referring these accounts to the appropriate Tax Services Office or National Pool
- Provide information about the taxpayers' responsibilities

Accounts Payable Clerk   **May 2012 - Aug 2012**

Accounts Payable, City of Ottawa, Ottawa, Ontario
- Utilized SAP and Kofax Markview to process and pay PO and Non-PO invoices as well as credits
- Liaised with both vendor and multiple internal stakeholders who requested goods/services to analyze and solve discrepancies
- Filed invoices and credits utilizing proper procedure and documentation for future audits

Head Lifeguard/Lifeguard/Swim Instructor/Customer Service Representative   **Sept 2008 - Sept 2018**

Canterbury Recreation Complex, City of Ottawa, Ottawa, Ontario
- Supervisor on shift; responsible for overseeing up to six lifeguards or instructors
- Responsible for teaching all ages water safety, swimming, diving, lifesaving, first aid, and aqua fitness
- Ensuring that all safety standards are followed, solving administrative problems, addressing client concerns and complaints, and mentoring and training new inexperienced employees
- Processing regular admission payments and registrations; documenting the float balance at the beginning and ending of each shift
- Team leader; emphasis on strong teamwork and leadership skills in a high stress environment

EXTRA-CURRICULAR/VOLUNTEER

Treasurer for the Board of Directors for Charlatan Publications Inc.   **May 2015 - Aug 2016**
Carleton University's Independent Student Newspaper, Ottawa, Ontario

- Chairing the finance committee, which includes creating an annual budget, implementing cost savings and surplus generating initiatives, and evaluating the effectiveness of internal controls
- Acting as a signing authority for any payments and fixed income market investments
- Using QuickBooks to perform accounts payable, accounts receivable and payroll functions, and reports to inform the Board at each meeting on finance related matters
- Representing the Corporation to the auditors, bookkeepers, banks, lawyers and any other financial resources
- Filing all relevant documentation with Corporations Canada to attain a Non-for-Profit Organization status; this includes making changes to the By-Laws and the Constitution then presenting them to the Board for approval

Additional

- Tutor for *Accounting for Business Combinations* (BUSI 3001 Carleton University course)   **Sept 2015 - Dec 2016**
  - Created instructional YouTube videos for *Accounting for Business Combinations*
    https://youtu.be/RYfCIX42eJ8
- First Aider at Sprott Business Student Society Soccer Tournament   **Sept 2012**
- Sprott Business Student Society Street Team Chair   **Sept 2011 - Dec 2011**
  - Oversaw 40 students, delegated marketing-oriented tasks and worked closely with a student society marketing team to successfully raise awareness regarding professional and leisure events
- Sprott Orientation Manager   **Sept 2011 & 2012**
  - Dedicated a week, two consecutive years to greet, move in, accommodate and orientate first year students