

JOSEPH M. URSCHLER

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EDUCATION

University of Missouri – Columbia

Bachelor of Science in Accountancy | Master's of Accountancy

Excellence Award Scholarship | Bright Flight Scholarship | ACT: 33 | GPA: 3.5/4

Columbia, MO

August 2011 – May 2016

Rithm School

Software Engineering Immersive

San Francisco, CA

March 2020 – June 2020

EXPERIENCE

Connor Group

Senior Consultant (Financial Operations, Digital Solutions)

San Francisco, CA

Sept 2019 – Present

- Worked with client senior management to design and improve business processes to simplify operations
- Led IPO readiness projects related to full general ledger reconciliation and business risk
- Assisted with development of systems integrations between applications such as NetSuite and Salesforce utilizing JavaScript, Java, and Boomi

Deloitte

Associate, Senior Associate, Senior (External Audit)

San Francisco, CA

Sept 2016 – Sept 2019

- Performed qualitative and quantitative analyses of financial statement account balances to verify material accuracy
- Collaborated in teams of four to twenty across financial services, technology, and retail industries to address accounting concerns and provide reasonable assurance on financial statement filings
- Interacted with a wide array of balance sheet and income statement accounts across the above industries
 - Performed discounted cash flow and market comparable valuations for client levels 2 and 3 investments
 - Advised a startup client on how and when to recognize revenue under the new ASC 606 regulations
 - Designed the commissions and variable compensation recognition plans for early stage company Expanse
- Met with and presented audit findings to client senior management: CEOs, CFOs, etc.

Associate Product Manager/Data Scientist (Audit Innovation)

Oct 2017 – April 2018

- Worked under and alongside global practice and firm leaders developing the firm's next generation audit platform
- Led development of specific risk assessment features using the Agile methodology
 - Managed a team of 5 software engineers and a business analyst while coordinating with cross-developing engineering teams
 - Maintained a backlog of 'stories' and communicated business requirements via 'stories' to the engineers then subsequently tested the developed 'stories'
- Created and maintained budget and actual performance metrics using Excel and VBA to track and analyze queried Microsoft Visual Studio data over the entire project of more than 250 people and \$1 billion

Aequitas Financial, I.C.

Founding Partner

St. Louis, MO

July 2012 – August 2014

- Founded and raised \$10K for an Investment Club with three friends the summer after Freshman year of college
- Returned 18.4% versus the QAI Hedge Fund Index at 6.7% during existence

ACTIVITIES

Mizzou Club Baseball

Coach, Player

Columbia, MO

August 2011 – May 2016

- Played and helped coach fall club baseball teams every year in college

Alpha Kappa Psi

Active, Alumnus

Columbia, MO

August 2012 – May 2016

- Participated in and led brotherhood and volunteer events throughout college

SKILLS/INTERESTS

- Skills: JavaScript, Python, Boomi, Java, Excel, VBA, PowerPoint, Bloomberg, Spanish
- Additional interests: fitness, travel, professional sports, movies, music production, history