

Client Name

Contact information

Summary of Qualifications

Throughout my career as a CPA working with both public and private entities, my focus is as much on driving process improvement as it is on accuracy; these improvements have achieved significant impact on each company's financial health. I provide accounting expertise and financial analysis for complex issues experienced by CPG, technology, and aviation companies, as well as supporting external and internal audits, and ensuring compliance with GAAP as well as Sarbanes-Oxley. My management philosophy is to foster a culture of accountability based on inclusion and respect.

Career Highlights

- Drove continuous process improvement, identifying areas that could be completed prior to month-end close, resulting in improved accuracy & timeliness of production data reporting
- Took over challenging implementation of new inventory management system that required extensive corrections to its valuations
- Charged with preparing base calculations as part of asset-based financing, & managed weekly borrowing base calculation
- Reduced working capital adjustment by \$1.5M as part of RiceBran's divestiture
- Reduced closing cycle times from 15 days to 5 days with deployment of a new closing schedule
- Entrusted to run audits within 6 months of hire at LarsonAllen
- Achieved unqualified audit opinions without material findings during 100% of RiceBran's audits
- Performed compliance audits of entities funded by World Bank Group, United Nations, USAID
- Enabled small business clients to save 90% of 1099 reporting expense with Quickbooks training

Professional Experience

Accounting & Finance Consultant

2019 - present

- Consult with clients in analytics software industry to build accounting & financial infrastructure: establishing efficient processes, developing data for financial analysis, & analyzing fluctuations
- Strengthen cash position through weekly cash flow forecasting & monitoring cash draws
- Perform monthly balance sheet accounts to subsidiary ledgers
- Maintain fixed asset registers, calculate monthly depreciation, & file multi-state & local tax returns
- Reconcile cash accounts & monthly reconciliation of intercompany account balances

Company Name

2018 - 2019

Controller

- Led 4 managers to oversee compliance with accounting operations: monthly, quarterly, & year-end closing schedules & preparation of monthly, quarterly, & year-end reporting including SEC reporting
- Established accounting & reporting procedures in accordance with GAAP, including GAAP accounting research & compliance with SEC, FASB, PCAOB & SOX 404
- Provided strategic direction to management informed by financial analysis, forecasts, & data analytics & KPI metrics
- Contributed to 10-K, 10-Q & 8-K reporting as well as monthly & quarterly closing
- Managed working capital: receivables, credit, inventory & vendor payments
- Conducted SOX testing & review to ensure accuracy re: key financial accounting & reporting
- Drove process improvement & system enhancements

Company Name

2014 - 2018

Director of Accounting

(Promoted twice to positions of increasing scope & responsibility)

- Hired & managed new 8-person accounting team following corporate office move from AZ to TX

- Advised managers on how to improve accuracy to reduce risks
- Managed accounting operations: general ledger, accounts receivable, invoicing, accounts payable, payroll, cost/inventory accounting, financial reporting & analysis
- Created financial analysis, forecasts, & ad hoc reports & for internal & external stakeholders
- Strengthened cash position through working capital management of receivables, credit, inventory & vendor payment practices
- Expedited external audits by providing worksheets/data to minimize billable hours
- Provided transaction-oriented accounting & reporting assistance for divestitures & acquisitions
- Conducted financial due diligence during corporate changes of control

Ellipsiz, Ltd

2014

Senior Accountant & Audit Consultant

- Supervised 3 internal auditors throughout audit engagements
- Performed financial & compliance audits on government & non-profit entities, including municipalities & school districts, as well as on global energy & Fortune 100 telecom companies
- Audited internal control systems in accordance with risk-based auditing standards
- Reviewed financial statements in accordance with IFRS & US GAAP standards

LarsonAllen/Cronstrom, Osuch & Co.

2009 - 2010

Accountant II

2007 - 2008

- Supervised 2 - 4 accountants performing both financial & compliance audits
- Audited internal control systems in accordance with risk-based auditing standards

Ernst & Young

2008 - 2009

Senior Accountant

- Managed 2 - 4 junior accountants during audits of energy & telecommunications companies
- Performed compliance audits of entities funded by the World Bank Group, the United Nations Organization, USAID, & other international institutions

Proctor & Gamble

2004 - 2005

Financial Analyst

- Provided NPV & ROI calculations to inform recommendations to brand management for CPGs
- Reviewed consumer marketing initiatives from profitability & cost perspective
- Developed price lists for Herbal Essence brand across Central Asia & Caucasus
- Evaluated regional markets for net sales & volume

Software

MAS SAGE 100, Quickbooks, Batchmaster, Fishbowl, PMI, ProSystem Engagement

Licensure & Certifications

Financial Modeling & Valuation Analyst (CFI); Certified Public Accountant (State of Arizona); COSO Framework of Internal Controls (AICPA); Certified Fraud Examiner (ACFE)

Education

Grand Canyon University, MBA

Eastern Oregon University, B.A. Accounting & B.S. International Business & Economics