

Jourdan Hay, CPA

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PROFESSIONAL SUMMARY

Skilled accounting and tax professional with 10+ years of experience preparing corporate, partnership, non-profit, and individual tax returns. Possess a strong background in analytical, quantitative, and critical thinking skills. Excel in managing all aspects of complex projects to meet quality objectives and defined deadlines in a demanding environment. Seeking to further develop my knowledge and skills in accounting, tax analysis, and relationship management.

SIGNATURE STRENGTHS/SKILLS

- Tax Preparation
- Tax Analysis
- Tax Research
- Accounting Process
- Internal Controls
- Balance Sheet
- Profit and Loss (P&L)
- Critical Thinking
- Prioritizing Workload
- Relationship Management
- Organization
- Policies and Procedures
- Process Management
- Process Improvement
- Excel & QuickBooks

PROFESSIONAL EXPERIENCE

JLH Accounting Services, LLC

Owner

July 2025-Present

Provide bookkeeping and accounting services to small businesses and nonprofit organizations. Complete and review monthly bookkeeping, provide monthly reports, and advise clients on bookkeeping issues.

- Categorize bank and credit card account transactions in accounting software to income and expense accounts.
- Reconcile all bank and credit card accounts as applicable.
- Review financial statements for accuracy and provide to clients on a monthly basis.
- Advise clients on process improvement opportunities and key financial updates and analysis.
- Maintain strong project management skills by managing deadlines and providing necessary follow-up.
- Build and maintain excellent rapport and working relationships with clients to complete monthly bookkeeping efficiently and thoroughly.

Medical Information Technology, Inc.

Tax and Accounting Manager

June 2024 – Present

Administer all corporate tax obligations by preparing federal and state tax returns, sales tax filings, and estimated payment schedules. Prepare tax and financial forecasts, monitor financial ratios, and manage book to tax differences. Maintain internal control procedures and monitor accounting and business controls.

- Prepare quarterly and annual tax provision calculations in accordance with ASC 740 standards.

- Participate in month end close process by preparing tax journal entries and financial statements for Board of Directors.
- Contact federal and state tax authorities related to letters, notices, and audits.
- Research tax implications related to entering new states and foreign tax jurisdictions.
- Track legislative and policy changes, emerging issues, and laws, and advise management as needed.
- Assist with general accounting projects and maintain accounting process documents.
- Created new sales tax procedures to streamline the process for sales tax submissions.
- Organized and manage process related to customer sales tax exemptions certificates.

Petersen Professionals PC

Tax Manager

Nov 2021 – June 2024

Senior Tax Associate

Aug 2016 – Nov 2021

Prepared and reviewed tax returns for C corporations, S corporations, partnerships, non-profit organizations, multi-state, and complex individuals. Identified potential opportunities for savings and risk reduction applicable to client's tax situation. Researched and documented technical tax issues for clients using various research tools. Completed and reviewed monthly bookkeeping, provided monthly reports, and advised clients on bookkeeping issues. Assisted small business clients with quarterly payroll and sales tax filings.

- Gathered relevant tax information, assisted clients with year-end adjustments, and completed returns for 100+ business, non-profit, and individual clients.
- Assisted other CPAs in firm to complete returns for 800+ business, non-profit, and individual clients.
- Managed the monthly bookkeeping process, including supervision of the in-house bookkeeper, for 30+ clients.
- Maintained strong project management skills by managing deadlines and providing necessary follow-up.
- Trained new employees in tax return preparation, bookkeeping process, and office procedures.
- Built and maintained excellent rapport and working relationships with clients and co-workers to complete returns, bookkeeping, payroll filings, and sales tax filings efficiently and thoroughly.

Internal Auditor – Prime Therapeutics

March 2016 – Aug 2016

Researched, developed, and updated existing and new internal and vendor audits as assigned. Conveyed audit findings, policy exceptions, compliance violations, and control weaknesses via final audit reports to management, audit committee, or external auditors, as required.

- Completed internal and vendor audits within budgeted time according to audit plan.
- Identified and implemented streamlined and efficient processes and procedures during audits.

Internal Auditor II – Alerus Financial

July 2014 – March 2016

Researched, developed, and updated existing and new internal audits as assigned according to the annual audit plan. Conveyed audit findings, policy exceptions, compliance violations, and control weaknesses to department managers through verbal and written communications.

- Developed new audit programs for Fraud and Compliance. Assisted in updating risk assessment tools for audit programs to ensure effectiveness.
- Identified and implemented streamlined and efficient processes and procedures during audits.

Prepared and reviewed tax returns for C corporations, S corporations, partnerships, non-profit organizations, complex individuals, and internal partner returns. Identified potential opportunities for savings and risk reduction applicable to client's tax situation. Researched and documented technical tax issues for clients using various research tools.

- Completed returns for 75+ business and non-profit clients and 40+ individual clients.
- Developed strong project management skills by responding to deadlines and providing necessary follow-up.

Additional Experience

Financial Institutions Consultant – RSM US LLP, Minneapolis, MN

Dec 2010 – Dec 2011

Credit Analyst I – Venture Bank, Bloomington, MN

May 2008 – Dec 2010

Credit and Portfolio Administrator – Flagship Credit Services, Wayzata, MN

Nov 2006 – May 2008

Loan Operations Processor II – American Investors Bank and Mortgage, Edina, MN

June 2005 – Nov 2006

EDUCATION AND CONTINUED TRAINING

Minnesota Board of Accountancy

2015

Certified Public Accountant

Hamline University, St Paul, MN

2012

MBA

University of South Dakota, Vermillion, SD

2005

BBA, Finance