Lindsay Adkins

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Location: Millsboro, DE

Professional Summary

Financial services professional with 10+ years of experience in process improvement, business operations, and cross-functional program management, complemented by hands-on tax preparation and financial recordkeeping experience. Currently completing AIPB's Certified Bookkeeping coursework, including adjusting entries, accounting error correction, payroll, depreciation, inventory, and internal controls. Experienced in bookkeeping support, account reconciliation, and preparing individual tax returns in compliance with IRS and state requirements. Known for accuracy, organization, process improvement, and a strong commitment to financial integrity and regulatory compliance.

Professional Experience

Richard A. Mason, CPA
Freelance Tax Preparer | Jan 2020 – Current

- Prepared and filed individual tax returns in compliance with IRS and state regulations.
- Communicated clearly and professionally with clients throughout the process.
- Provided bookkeeping services as needed.
- Performed reconciliation services to resolve discrepancies as needed.

Principal Financial Group
Configuration Analyst | Nov 2021 – Aug 2024

- Served as a subject matter expert in business processes and product configuration for multiple operational pillars.
- Led cross-functional teams to implement new processes and technology solutions, ensuring operational readiness and alignment with KPIs.
- Monitored process effectiveness, analyzed metrics, and recommended improvements to enhance efficiency and quality.
- Developed dashboards and automated reporting using SQL, RPA, and VBA to provide actionable performance insights.
- Captured, documented, and visualized workflows using Visio and Jira; maintained procedural documentation in SharePoint.

- Actively participated in Agile ceremonies including sprint planning, stand-ups, and sprint reviews to ensure program delivery.

Principal Trust Company

Business Process Analyst | Mar 2019 – Nov 2021

- Designed and implemented streamlined business processes using data-driven analysis and process mapping techniques.
- Led cross-functional projects, coordinating teams to deliver large-scale operational changes on time and within scope.
- Partnered with stakeholders to track KPIs, identify gaps, and implement mitigation plans to meet performance targets.
- Provided expertise in continuous process improvement, ensuring alignment with regulatory requirements and operational objectives.

Compliance Analyst | Sept 2015 – Mar 2019

- Researched and addressed compliance issues, supporting audits and regulatory testing.
- Reviewed operational procedures, communicated regulatory changes, and implemented risk mitigation strategies.
- Assisted product and operations teams in understanding regulatory impact and process improvement opportunities.

J.P. Morgan

Fund Analyst / Transaction Specialist | Dec 2011 – Sept 2015

- Managed mutual fund trading operations, ensuring compliance with pre-trade and regulatory requirements.
- Developed and documented analytical controls and workflows to reduce operational risk and prevent errors.
- Coordinated cross-functional reconciliations between custody, accounting, and transfer agent systems.

Education

Goldey Beacom College

Bachelor of Science in Business Administration
Concentrations in both Finance and Marketing