

## PROFESSIONAL SUMMARY

Accounting and Client Director with over 25 years of expertise in financial management, specializing in process improvement and client relations. Skilled in leveraging advanced accounting software and techniques to enhance financial reporting accuracy and efficiency for diverse clients. Demonstrates a strong commitment to developing innovative strategies and internal controls that optimize financial health and operational productivity.

## EMPLOYMENT HISTORY

JAN 2024 - PRESENT

### Accounting and Client Director, Prime Ledger, Remote

- Oversee and manage financial reporting for multiple clients, ensuring timely and accurate results.
- Lead a team of domestic and international accountants, delegating tasks effectively.
- Prepare and review financial statements, budgets, and forecasts, driving financial accuracy.
- Conduct financial analysis and provide actionable recommendations for improvement.
- Develop and implement accounting procedures and internal controls to enhance efficiency.
- Pioneered innovative accounting strategies to optimize client financial health.
- Enhanced reporting accuracy by implementing advanced analytical tools.
- Boosted team productivity by streamlining workflow and enhancing procedures.

DEC 2010 - APR 2024

### Owner/Bookkeeper, CMR Bookkeeping Services, Remote

- Implemented accounting procedures, enhancing efficiency and accuracy, ensuring regulatory compliance.
- Led annual audits for major clients, identifying inaccuracies leading to \$125K IRS penalty abatements.
- Conducted payroll cost analysis, reducing expenses by 18% through technology upgrades.
- Performed financial due diligence for a \$30M acquisition, supporting termination of a risky deal.

MAR 2020 - MAR 2023

### Special Project Accountant, Southern Fluid Solutions LLC, Center, Texas

- Managed accounting for diverse businesses, ensuring accuracy across QuickBooks files.
- Implemented asset tracking system for 250+ assets, enhancing management efficiency.
- Maintained fixed assets monthly, improving compliance and accuracy.
- Created assets, conducted research, and performed loan reconciliations.
- Adapted to special projects, consistently delivering results.

OCT 2015 - MAR 2016

### Staff Accountant, Estes Armstrong Earley LLC, Cleburne, Texas

- Reviewed and analyzed financial records to ensure accuracy and compliance with standards.
- Computed and prepared tax returns, ensuring adherence to all tax regulations.
- Delivered internal and external audit services for businesses and individuals.
- Utilized appropriate adjustments to minimize clients' tax liabilities.
- Prepared detailed financial statements for small businesses and individuals.

AUG 2009 - AUG 2011

### Chief Financial Officer and Director of Human Resources, Allmand and Lee, PLLC, Bedford, TX

- Managed accounting systems, ensuring timely and accurate financial reports for partners.
- Coordinated audits and tax filings, maintaining compliance and timely submissions.
- Conducted cash flow planning, ensuring fund availability and efficient asset management.
- Oversaw financial strategies and banking relationships, enhancing financial stability.
- Handled HR functions for 80+ employees, including payroll, benefits, and employee relations.

AUG 2007 - AUG 2009

**Multi-Media Production Sales and Marketing Coordinator & Board Treasurer, Military Police Regimental Association, Fort Leonard Wood, MO**

- Prepared financial reports, including budget forecasts and income vs. expenses projections.
- Implemented cost-saving measures, reducing overhead expenses.
- Managed IT needs, researched new systems, and resolved technical issues.
- Served as Treasurer on the Board of Directors, overseeing all financials for the non-profit.
- Generated quarterly financial reports covering all revenue streams and expenses.
- Reported directly to the Executive Director, ensuring financial transparency.
- Designed, implemented, and maintained an online gift shop, increasing online sales.
- Redesigned the website, enhancing user experience and engagement.
- Created monthly HTML newsletters for 5,000+ members, improving communication.
- Coordinated with various stakeholders to produce quarterly magazines.

DEC 1999 - JUL 2006

**Accounting and Billing Manager (CFO), Ohashi & Horn LLP, Dallas, Texas**

- Managed all accounting functions, including taxes, A/R, A/P, and bank reconciliations, for international law firm.
- Generated detailed financial reports and computed year-end and quarterly taxes, ensuring compliance.
- Prepared monthly bills for 100 clients and entered time for 15 attorneys, maintaining accuracy and efficiency.
- Supervised a team of 6, coordinated payroll for multiple offices, and communicated with Japanese clients.
- Maintained bar associations and obtained EIN numbers, enhancing firm's operational efficiency.

**EDUCATION**

MAY 2020 - JUL 2024

**Bachelor of Science - BS Digital Marketing, American Public University System, Online**

Digital Marketing

1999 - 2004

**Bachelor of Science (B.Sc.), Southern Methodist University**

Psychology

**COURSES**

JUN 2024

**ClickUp Novice Certificate of Completion at ClickUp**

JUN 2024

**Intuit Academy Bookkeeping Specialization at Intuit**

2024 - 2024

**Gusto Payroll Certification**

2022 - 2024

**QuickBooks ProAdvisor**

**SKILLS**

Client Relations



Month-End Close Process



QuickBooks



Finance



Budgeting & Forecasting



Financial Statements



Process Improvement



Journal Entries

