

SARA ZIDAL, CPA

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SUMMARY

Certified Public Accountant and Financial Strategist with 20+ years of progressive experience spanning tax compliance, GAAP financial reporting, operational leadership, and executive advisory services. Founder of SZ Accounting, delivering CPA-led accounting, tax strategy, profitability consulting, and financial education to small businesses and growth-stage organizations. Recognized for combining technical precision with strategic insight to improve cash flow, reduce tax exposure, and strengthen internal controls. In addition to client advisory work, actively provide financial workshops and CPA exam coaching, equipping business owners and aspiring CPAs with the knowledge and systems required for long-term success. Known for stepping into high-impact environments, diagnosing financial inefficiencies quickly, and implementing scalable, revenue-enhancing solutions.

EXPERIENCE

Owner | Principal CPA

SZ Accounting

August 2022 – Present, Indianapolis, IN

- Manage fullcycle accounting and tax operations for more than 25 recurring clients.
- Prepare and review individual and business tax returns (1040, 1065, 1120) with attention to federal and state compliance.
- Complete monthly reconciliations, adjusting entries, depreciation schedules, and financial statements.
- Provide tax planning, estimated payment projections, and ACA reconciliation support.
- Expanded client base by 30% through workshops and advisory services.
- Supervise subcontractors and implement standardized workflows to improve accuracy and turnaround times.

Founder and Instructor

SZ Accounting

August 2022 – Present, Indianapolis, IN

- Design and deliver profit optimization and financial literacy workshops for small business owners
- Provide CPA exam coaching focused on exam strategy, conceptual mastery, and application
- Develop structured financial training programs to help business owners improve bookkeeping accuracy and cash management
- Create educational resources that bridge compliance requirements with practical business decision-making
- Mentor aspiring accounting professionals pursuing licensure.

Tax Specialist

Baker Tilly

December 2022 – April 2024, Indianapolis, IN

- Managed a portfolio of 30+ clients, including Schedule C, partnership, and corporate returns.
- Led amended return projects and reduced audit exposure through detailed compliance reviews.
- Advised clients on entity selection and tax-efficient strategies.
- Improved team efficiency by integrating QuickBooks and ProSeries processes.
- Mentored junior preparers and supported internal quality control.

Accounting Manager (Manager in Charge)

ABA Transportation

May 2021 – July 2022, Indianapolis, IN

- Directed accounting operations for a multistate transportation company with 15+ employees.
- Oversaw payroll, AP/AR, reconciliations, journal entries, and month-end close.
- Delivered financial reports and variance analyses to leadership.
- Strengthened internal documentation and audit readiness procedures.

Financial Services & Fraud Analyst

Nordstrom

October 2016 – December 2021, Indianapolis, IN

- Investigated discrepancies and prevented more than \$3M in potential fraud losses.
- Enhanced compliance documentation and internal controls.
- Supervised junior analysts during complex investigations.
- Developed fraud detection procedures that reduced response time and risk exposure.

Banking Service Specialist

Charles Schwab

October 2013 – December 2015, Indianapolis, IN

- Reconciled banking accounts in accordance with regulatory standards.
- Supported internal and external audit preparation.
- Maintained FINRA and FDIC compliance requirements.

Default Accounting Processor

Washington Mutual**October 2007 – March 2010, Melbourne, FL**

- Processed chargeoffs and tax reporting during the mortgage crisis.
 - Recorded adjusting entries and reconciled defaulted loan balances.
 - Supported transparency efforts during restructuring.
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EDUCATION

Certified Public Accountant (CPA)**Master of Science in Accounting**

Indiana Wesleyan University

Bachelor of Science in Accounting

Indiana Wesleyan University

Associate of Science in Accounting

Ivy Tech Community College

CERTIFICATIONS

Certified Public Accountant (CPA)

SKILLS

Executive Financial Leadership: CFO-Level Advisory & Profit Optimization, Strategic Tax Planning & Capital Allocation, Cash Flow Forecasting & Liquidity Management, Internal Controls & Risk Mitigation

Tax & Regulatory Expertise: Complex Individual & Business Tax Compliance, Multi-State & Payroll Tax Strategy, ACA Premium Tax Credit Analysis (Form 8962), Estimated Tax Modeling & Penalty Mitigation

Accounting Operations & Systems: Accelerated Month-End Close & Financial Reporting, Audit Preparation & Compliance Management, Workflow Automation & Digital Accounting Systems, QuickBooks Advanced Implementation & Process Redesign

Education, Mentorship & Development: Financial Workshops & Business Training, CPA Exam Coaching & Candidate Strategy, Staff Mentorship & Technical Training, Public Speaking & Instructional Leadership

QuickBooks, ProSeries

Languages
