SHANNON OTIS

ACCOUNTING | FINANCIAL OPERATIONS | BUSINESS & PROPERTY MANAGEMENT



CONTACT

406-231-5715

shannono.hmc@gmail.com

Billings, MT

EDUCATION

Accounting, Business Management

Montana State University

SKILLS

- Licensed Property Manager
- QuickBooks
  - Desktop
  - Online
- Financial Management
- Bookkeeping
- Asset Management
- Construction Management
- Office Management
- Real Estate Development
- Legal Contracts
- Human Resources
- Microsoft Office Suite
- LeanLaw
- AppFolio

REFERENCE

Ted Lewis

First Interstate Bank

406-590-2555

David Pfile

Grabofsky, Van Heel, Funderburk

406-781-4443

PROFESSIONAL PROFILE

Experienced financial and operations professional with 20+ years of experience across accounting, banking, real estate, construction, and business management. Extensive background in bookkeeping, budgeting, payroll, financial controls, and oversight of $300M+ in real estate assets. Highly proficient in QuickBooks Desktop and Online, with a proven ability to improve financial processes, maintain accurate records, and support executive-level decision-making.

PROFESSIONAL EXPERIENCE

Owner | Financial & Business Operations

QB Managers, LLC, 2011-Present

Billings, MT

- Manage accounting and financial operations for company and client entities, including budgeting, cash flow, financial reporting, and account reconciliation.
- Oversee financial activity associated with approximately $300 million in real estate assets.
- Manage accounts payable, accounts receivable, banking, and general bookkeeping functions.
- Perform account reconciliations, financial reviews, and internal audits to identify discrepancies and maintain accurate records.
- Coordinate with CPAs, banking professionals, attorneys, vendors, and other outside professionals on financial and business matters.
- Manage financial aspects of construction and capital improvement projects, including budgets, expenditures, vendor payments, and cost tracking.
- Oversee HR administration, including hiring, onboarding, payroll, benefits, and employee records.
- Negotiate and administer real estate transactions, leases, contracts, and vendor agreements.

Licensed Property Manager

Investment Property Managers, 2011 -2026

Great Falls, MT

- Managed financial and operational performance of residential, commercial office, retail, and restaurant properties.
- Managed lease administration, tenant accounts, vendor relationships, and property-related financial documentation.
- Oversaw construction and capital improvement projects from budgeting and contractor coordination through completion.
- Led staff development and coordinated relationships among owners, tenants, vendors, contractors, and other stakeholders.

Commercial Loan Assistant, Commercial Teller

First Interstate Bank, Heritage Bank, 2001 -2011

Great Falls, MT

- Managed commercial loan documentation from application through closing, including titles, appraisals, mortgages, and agreements.
- Supported commercial lenders with loan processing, account administration, and financial documentation.
- Ensured accuracy and compliance with federal banking regulations and internal procedures.
- Managed customer accounts and resolved transaction and documentation issues.