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| Terry W. Porter |  |
| **509 Hopewood Court, Franklin, TN 37064-5529** |
| **615-975-1349 ▪ TerryWPorter@comcast.net** |  |

**PROFESSIONAL ACCOUNTANT SUMMARY**

* Looking for the part of accounting/bookkeeping that I love.
* Skilled accounting professional with experience in financial and operational areas of insurance, banking, data processing, and non-profit.
* Excellent track record of reducing cost and time management by using organizational skills.
* Proven skills in developing innovative ways to organize and report data.
* Approaches problems with **common sense and logical thinking**.

**PROFESSIONAL EXPERIENCE**

**Accountant, CoCard Marketing Group, October 2022 to March 2023**

**Responsibilities:**

* Pull reports from various credit card processors.
* Prepare residual reports for company members.
* Enter transactions into QuickBooks.

**Temp Accountant Positions, December 2021 to August 2022**

**Responsibilities:**

* Account Payable functions.
* Entered data for daily hotel sales revenue report.

**Achievements:**

* Expanded sales revenue report to make it more useful.
* Gained experience with Great Plains and OnBase AP system.

**Accountant III,** **Caterpillar Insurance Co Nashville, TN November 2020 to November 2021**

**Responsibilities:**

* Prepared month end closing entries
* Completed parts of the NAIC P&C Statutory Annual & Quarterly Statements
* Completed & Filed State and other Regulatory Filings
* Account reconciliations

**Achievements:**

* Met daily, weekly, monthly, quarterly, and yearly deadlines.
* Improved reconciliation worksheets.

**Senior Accountant, Brentwood Services Administrators, Brentwood, TN December 2018 to August 2020**

**Responsibilities:**

* Investment reporting
* Completed parts of the NAIC P&C Statutory Annual & Quarterly Statements
* Completed & Filed State and other Regulatory Filings
* Account reconciliations

**Achievements:**

* Improved and documented the investment reporting processes and procedures.

**Advanced Staff Accountant, First Bank, Nashville, TN June 2018 to November 2018**

**Responsibilities:**

* Performed various projects for the Finance Department.

**Achievements:**

* Creating reconciliations including a special reconciliation for ATM machines

**Senior Accountant, FNB (formerly Peoples State Bank of Commerce), Nolensville, TN June 2015 to November 2017**

**Responsibilities:**

* Produced accurate and timely monthly board reports and FDIC Call Reports.
* Prepared and filed regulatory reports insuring proper investment levels.
* Verified incoming and outgoing wires.
* Reconciled Balance Sheet accounts.
* Supervised Account Payable activities.
* Produced various ad hoc reports with Excel and IBM Cognos.

**Achievements:**

* Prevented wire fraud**.**
* Revised reconciliation sheets.
* Recognized income was not being reported timely and changed the procedures.
* Took over supervision of Accounts Payable.

**IT Financial Support Specialist, Fiserv (formerly Fi-Data), Franklin, TN August 2006 to August 2014**

**Responsibilities:**

* Provided technical support to client banks in the following areas: General Ledger, Fixed Assets, Check Reconciliation, Accounts Payable, Investments and Budgets.
  + Helped other customer tech support staff outside of my area of expertise.

**Achievements:**

* + Resolved problems of various kinds on different modules.
  + As part of the conversion team, accomplished the first important step in converting general ledgers.

**Staff Accountant, Civitas BankGroup, Franklin, TN January 2003 to June 2006**

**Responsibilities:**

* + Prepared quarterly and annual FDIC Call Reports.

**Achievements:**

* + Became reconciliation expert in reconciling complex accounts.

**Bookkeeper, Brentwood High School, Brentwood, TN January 2001 to January 2003**

**Responsibilities:**

* + As a full-charge bookkeeper, collected cash, recorded transactions, and deposited funds.

**Achievements:**

* + Developed reports to track teacher accounts and spending limits each school year.
  + Convinced and tested out a more user-friendly financial reporting system.

**Vice President and Assistant Treasurer, Franklin American Life Insurance Company, Franklin, TN February 1989 to January 2001**

**Responsibilities:**

* + Prepared NAIC Life Statutory Financial Statements (Cash, Accrual & GAAP)
  + Prepared and helped analyze and file all quarterly and annual GAAP reports to the SEC.
  + Booked investment transactions.

**Achievements:**

* Promoted to Vice President and Assistant Treasurer from Staff Accountant
* Supervised one assistant.
  + Prioritized work among 2 holding companies and 5 subsidiaries to meet deadlines by 2 weeks
  + Maintained duties as the organization grew from $19 million with 1 holding company and 1 subsidiary to $60 million between 2 holding companies and 5 subsidiaries.
  + Streamlined the data collection, reporting and analysis of financial information.

**Accountant,** **American General Life and Accident Insurance Company, Nashville, TN January 1984 to January 1989**

**Responsibilities:**

* Gained experience in the structure of a large insurance company.

**Achievements;**

* Reorganized the Chart of Accounts.
* Promoted to be part of the Statutory and GAAP reporting team.
* Supervised data collection team within Accounting Department.

**EDUCATION**

* BSBA, University of Alabama-Huntsville, Huntsville, AL

**SOFTWARE**

* Microsoft Office **Excel** **(****Pivot Tables, formulas, Vlookups, SUMIFS),** Word.
* Other programs: QuickBooks, Cognos, Quicken**, Great Plains**, **Sage Intacct**, FIS, **Oracle**, Bill.com, M3.

**RELATED EXPERIENCE**

* + **Certified QuickBooks Pro Advisor**.
  + **American Association of Professional Bookkeepers member**.
  + **Former Director/Secretary/Treasurer**, 19 years, Williamson County Soccer Assoc., Franklin, TN. Performed all accounting functions. This included payroll and budgeting.
  + **Former Deacon/Former Treasurer**, 20 years. The Church of Christ at Millview, Franklin, TN.

AS Treasurer, performed all accounting, payroll, budgeting, and tax functions.

* + **Former Treasurer.** 1 year. Cougar Athletic Club at Centennial High School.