

# Terry Ondo MPAcc - Accountant

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## Profile / Summary

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Accountant (MPAcc) expert in analyzing complex financial statements, including balance sheets, P&L, and cash flow, to provide small to medium sized construction organizations with profit-led insight into business performance. Fosters trusting relationships with cross-functional internal and external stakeholders, to maintain a robust finance environment, facilitate smooth project progress, and to negotiate favorable terms with third parties. Introduces and continually improves accounting and operational best practice processes, to meticulously control capital expenditure, business, and project costs. Leverages proven experience across finance, HR, operations, management, and technology, to provide holistic business input, and maintain compliance with strict labor laws and payroll tax requirements. **Areas of expertise include:**

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|--------------------------|----------------------------------|-------------------------|
| ▪ Accounts Receivable    | ▪ Financial Analysis & Reporting | ▪ IFRS & GAAP           |
| ▪ Accounts Payable       | ▪ Third Party Management         | ▪ Sage 50 & QuickBooks  |
| ▪ Management Reporting   | ▪ Digital Transformation         | ▪ Expense Audit         |
| ▪ Operations Management  | ▪ Technical Implementation       | ▪ Financial Controls    |
| ▪ Stakeholder Management | ▪ Process Implementation         | ▪ Project Cost Analysis |

## Career Highlights

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- Pearson Masonry desired modernized business systems. As Accountant & Office Manager, led digitalization of core processes and transition of legacy MS DOS system to Windows. Executed deep-dive review of the existing system to define requirements; identified and assessed pros and cons of various solution options; presented recommended solution and secured leadership sign-off; onboarded Windows; and delivered implementation. Succeeded in driving cultural change towards digital thinking and reducing monthly overheads by c. 10%.
- Northern Colorado Tax Service's corporate office defined a minimum average net tax preparation fee. As Office Manager, investigated solutions. Collaborated with stakeholders to determine current performance and objectives; reviewed legacy tax preparation techniques; researched staff incentive programs; designed bespoke incentives; and implemented weekly and seasonal benefits. Succeeded in increasing number of tax returns by c. 10%, staff retention by 50% and far exceeding net preparation fee requirements.
- A construction company with \$2m annual revenues presented monthly accounting files. Engaged as Accountant to review financial statements. Leveraged QuickBooks to assess P&L/balance sheet; identified misclassified transactions; escalated significant debit balance in payroll liabilities account; gathered payroll reports from third-party to create journal entries for unreported figures; and reclassified personal expenses, payroll liabilities and income. Succeeded in rapidly rectifying overreported net income, reducing tax liability by \$90k.

## Professional Experience

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### Accountant & Office Manager: Pearson Masonry Company: 1995 – Present

*Pearson Masonry is a leading US masonry contractor for public, retail, education, and government markets.*

Recruited as the accounting specialist, with a focus on financial analysis and reporting relating to tax and performance. Accepted additional responsibility for HR, IT, office management and project administration.

Act as business partner to leadership stakeholders, relied upon to provide meticulous financial and operational insight. Introduce finance, HR and IT processes and policies. Deploy a continuous improvement strategy to regularly realign the office environment with evolving business requirements. Manage change across project contracts, accounting entries and corporate IT systems. Document and prepare contractor pre-qualification

packages. Purchase office equipment, negotiate employee benefits, general liability, and compensation premiums. Execute deep-dive analysis into, and report on, payroll processing, quarterly/annual tax, and project finances.

**Key Contributions:**

- Standardized the tracking system for construction projects and billings to ensure compliance and accurate, comprehensive billing of contracts.
- Developed human resource onboarding best practice for U.S. Department of Labor hiring compliance.
- Executed end-to-end digital transformation of business systems and migration from MS DOS to Windows; receiving plaudits for effectively driving a digital cultural change and reducing overheads by c. 10%.

**Owner, Tax Specialist & Accountant: TEO Tax & Accounting: 2000 – Present**

*TEO Tax & Accounting is a tax preparation and accounting firm for individuals and small businesses.*

Engaged by multiple, often concurrent, individuals and business clients. Oversee, advise upon, and prepare personal, partnership, non-profit, and corporation, annual federal, state, and local income tax returns.

Foster strong client relationships and partner with business owners to review financial statements and performance to support the development of short, mid, and long-term business strategy. Administer and document monthly payroll and accounting. Liaise with third-party accounting firms to ensure compliance by delivering analysis of financial statements. Coordinate pre-qualification documentation for general construction contractors and facilitate seamless audits of annual general liability and workers compensation insurance. Execute analysis of financial statements and liaise with clients to provide value assessments of franchise operations.

**Key Contributions:**

- Corrected and digitally filed an individual's income tax returns in compliance with IRS and State of Colorado requirements, ultimately completing in advance of deadline and increasing the tax refund by \$8k.
- Reviewed the monthly accounting files of a \$2m annual revenue construction company, recognized for rapidly identifying and remediating overreported net income to reduce tax liability by \$90k.
- Created and implemented documents and processes for marketing assistance prequalification services, streamlining marketing summary processes resulting in successful sales of client franchise organizations.

**Lead Instructor & Online Instructor: Center for Excellence in Higher Education: 2018 – 2021**

*CEHE, a non-profit career college, offers associates, bachelors, and master's degrees in business, medical, and IT.*

Promoted to act as a key business and IT Subject Matter Expert in the education dept., focused on driving an increase in retention, completion, and pass rates. Plan and deliver engaging lessons on business and IT, in compliance with family educational rights and privacy act. Mentor students and accommodate individual learning and development needs. Train and lead Instructors on blended education compliance and the canvas learning management system. Review, grade, and provide personalized feedback on assignments and assessments.

**Key Contributions:**

- Implemented additional certifications to improve student retention and performance, including low-cost TestOut, MS Office and technical assistance courses, consequently increasing overall pass rates by 40%.
- Commended for enabling an individual student to achieve ranking within the top 20% of the United States for TestOut PC Pro and TestOut Network Pro certification exams.
- Identified and escalated the needs of a struggling student with previously unrecognized learning difficulties; acted as a champion for the individual, secured the Dean's buy-in, and transformed the experience with a personalized development plan that enabled the student to secure a first ever 'A' grade.
- Contributed to the organization's emergency response to Covid by supporting a transition to online learning.
- Received multiple awards, including the President's award for exemplifying the organizations key visions and values and x2 student satisfaction awards for 2 separate quarters.
- Achieved and consistently maintained a 95%+ rating on governing body compliance audits.

## **Director of Technology & Purchasing: Northern Colorado Tax Service: 2002 – 2014**

*Northern Colorado Tax Service, trading as Liberty Tax Service, is an income tax preparation and services business.*

Appointed with a diverse set of responsibilities, such as the overall IT infrastructure, including network design and implementation, business-as-usual operations for the tax preparation offices, and all office purchasing needs. Recruited, trained, and managed tax and return specialists, call center staff, and marketing team. Partnered with a variety of stakeholders, including franchise executive teams to drive data-led development of organizational strategies, goals, and policies. Compiled and presented regular issue, solution, and progress reports to senior staff.

### **Key Contributions:**

- Coordinated and led tax training courses with experienced staff across 5 offices.
- Designed, implemented, and continually improved an intermediate course for returning preparers.
- Achieved HQ's mandated minimum average net tax preparation fees with a tailored staff incentive program, increasing the number of returns by c. 10%, staff retention by 50% and far exceeding outlined targets.
- Supported expansion with a standardized supply chain process, reducing expenditure by 90% across 5 offices.
- Devised, secured buy-in for, implemented, and continually improved a digital ticketing system that achieved 99% uptime across 6 offices.

## **Education / Credentials / Training**

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**Master of Professional Accounting (MPAcc)**, Colorado State University Global

**Bachelor of Science (BS) in Information Technology**, Colorado State University Global

## **Additional Information**

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**LinkedIn:** [www.linkedin.com/in/terryondo/](http://www.linkedin.com/in/terryondo/)

## **Recommendations**

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'Of the hundreds of employees in my organization over the years, Terry continually proved to be the most trusted, loyal and capable individual on our team. She held significant responsibilities in a variety of areas within the organization and she always proved to perform the tasks and various projects at the highest level. If I were building another team or simply looking to hire a dedicated, honest and very competent individual, Terry would receive my first phone call.' Jeremy Pourbaix, Owner, Northern Colorado Tax Service