



Seasoned Financial Manager with significant and diverse experience in financial operations. Solid capability and demonstrated successes in accounting, financial management, budgeting, and financial systems. Well versed in developing and defining accounting operations and financial functions, analysis and reconciliations, auditing. Demonstrated ability to manage multiple initiatives within fluid business settings; proficiency in building rapport and communicating strategies and results with key stakeholders and senior leaders.

Competencies include:

Financial Management
Financial Analysis
Budgeting
Cost Accounting

Accounting Operations
Financial Statements
Microsoft Excel
Auditing & Assurance

Financial Information Systems
Mergers & Acquisitions
Reporting, Analytics, KPIs
Process Management & Definition

Professional Experience

Accounting Supervisor Organization 1

Location 1
2013 - 2014

Served as a **Senior Staff Accountant** and **Accounts Receivable Supervisor** in a national association representing nearly 900 telecommunications companies in advancing communications services to rural America, and representing the sector in a legislative regulatory capacity. Reporting to the Controller, supervised the Accounts Receivable Department, analyzed financial data to make recommendations to senior leadership, managed State Street transfers and intercompany financial transactions, served as a functional lead on financial system implementation team, managed and improved multiple internal accounting processes that yielded measurable bottom line improvements. Specific accomplishments include:

- **SOP and Process Development:** Analyzed workflow and deliverables to determine areas of improvement. Implemented process control mechanisms to ensure timely completion of financial activities, realizing an approximate 75% decrease in missed deadlines.
- **Department Management:** Managed all activities and staff within the Accounts Receivable department, including collections, cash and credit receipts, bank reconciliations, financial transfers, general ledger accounting, etc. Administratively managed employees, trained and mentored subordinates, assessed performance, identified areas for development, etc.
- **Financial System Implementation:** Served as functional lead for all Accounts Receivable requirements throughout the implementation of Association Anywhere, a cloud based SAAS software package integrated to streamline operations, enhance member service, and interface with back-office applications. Involved in functional and user acceptance testing. Analyzed effectiveness of current configuration, identified required modifications and enhancements, and communicated requirements to development team. Tested accuracy of data Association Anywhere/Great Plains Integration.
- **Internal coordination and collaboration:** Worked with multiple internal stakeholders to improve quality and effectiveness of financial records and activities. Worked closely with membership to enhance financial processes for member related activities.

Staff Accountant Organization 2

Location 2
2009 - 2012

Conducted revenue calculations, analyzed company financial position, and bank reconciliations for a regional advanced cost management solutions company operating in support of health plans, reinsurers, and third party administrators. Served as back office augmentation for clients, delivered financial solutions, audited and reconciled financial activity in intercompany records. Managed accounts receivable activity that included hiring staff, training, and over seeing the accounts receivable department. Notable accomplishments include:

- **Financial Analysis and Reconciliation**
 - Managed monthly closing activities and bank reconciliations.
 - Conducted analyses of high dollar claim activity in support of external audits
 - Worked with clients on complex account reconciliations and billing activity
 - Decreased collections 77% by working directly with the clients to identify and resolve constraints.

- **Process Management and Documentation**
 - Managed and documented all Accounts Receivable Department procedures
 - Assessed monthly billing upload process and worked with the IT department to streamline, delivering an estimated 22% increase in accuracy.
- **Accounts Receivable Management**
 - Entrusted with managing full cycle accounts receivable (A/R) reports, including reviewing and analyzing A/R aging reports, and collaborating with management to bring overdue A/R accounts up to date.
 - Investigated collection issues related to billing and conduct audits of outstanding accounts.
 - Assessed post adjustments, overpayments, refunds, and checks; processed cash, credit, wire transfers, and checks.
- **Customer Service / Client Interface**
 - Worked as client back office augmentation, leveraging company resources to solve client problems.
 - Consulted with clients to determine areas to enhance billing, collections, and other accounting services
 - Advised clients on optimal billing procedures based on their processes and financial systems.

Project Costing Auditor

Organization 3

Location 3

2008 - 2009

Managed Cost Accounting activities associated with multiple projects for a privately held commercial restoration and development company. Developed meaningful analytics and identified revenue and expenditure trends to allow project managers the ability to manage projects against benchmarks and more accurately bid on potential work. Assisted in the development of an in-house job costing system.

- Developed company's project costing methods.
- Developed model for allocation of indirect and overhead costs.
- Managed project payroll, operational budgets, and actual costs incurred.

Sales Analyst

Organization 4

Location 4

2007 - 2008

Managed accounting functions for a regional consumer and commercial equipment manufacturer and distributor. Completed detailed variance analyses, reported on income streams and operational expenditures, developed financial statements, and conducted market analyses to determine sectors of opportunity for expansion or growth.

Real Estate Investment Portfolio Accountant

Organization 5

Location 5

2006 - 2007

Served as a Real Estate Investment Portfolio Accountant for a Global leader in wealth management. Independently managed accounting activities for a \$1 Billion real estate investment comprised of multiple security types. Performed equity reconciliations including incoming allocation, IRR, sales proceeds allocation, equity roll-forward, net partnership interest, and equity investment at cost. Managed portfolio month end close activities, budgets, cash distributions and contributions. Conducted analysis and reconciliation of general ledger accounts.

Auditor

Organization 6

Location 6

2005 - 2006

Served as an auditor assessing financial activities for MetLife, Inc., a leading global provider of insurance, annuities and employee benefit programs. Reviewed records to ensure recording of transactions and compliance with laws and regulations. Managed collection, analysis, and verification of payroll information to identify areas of concern; audited distribution of funds. Ensured accurate client practice through investors accounts by bank statement tracing.

Education

Bachelor of Science, Accounting

University of Iowa

Technical Skills

- Microsoft Office Suite Proficiency, Advanced MS Excel Proficiency
- Software: Association Anywhere, MRI, CMS, Great Plains, Quick Books, AS2 Auditing Database