

### INDUSTRY EXPERIENCE

- Technology
- FinTech
- CRO
- Energy
- Manufacturing
- Construction
- Nonprofit
- Power & Industrial Engineering
- Healthcare
- Financial Institutions

### FUNCTIONAL EXPERIENCE

- Accounts Payable
- Accounts Receivable
- Financial Planning & Analysis
- Project Cost Accounting
- Payroll Processing
- Bank Reconciliation
- Month-end Closing Knowledge
- Revenue Recognition
- Revenue Forecasting
- Sales & Use Tax
- Fixed Assets
- GAAP Application
- Grant Administration

### SYSTEMS EXPERIENCE

- NetSuite
- Dynamics GP
- Sage Intacct
- IFS
- Epicor
- QuickBooks Enterprise
- Expensify
- Ramp
- Salesforce
- SharePoint
- Payroll/HRIS (Namely, ADP, Paylocity, Paychex)
- Xero
- MS Excel

### EDUCATION & CERTIFICATIONS

Master of Science  
Accounting, American Public University

BA in Finance, North Carolina Central University

### EXECUTIVE SUMMARY

Highly trained and experienced accounting professional, skilled at keeping records current, accurate, and compliant. Experienced with forecasting operations and establishing budgets across multiple industries.

### RELEVANT EXPERIENCE

- Supported an energy solutions company stabilize and improve its AP operations. Initially managed manual invoice entry during a leadership gap, then shifted to RNI reconciliation once the AP team expanded. Updated key documentation and created analysis tools.
- Stepped into a transportation software company to handle cash receipts, perform intercompany and balance sheet reconciliations, and file GST/HST taxes.
- Conducted an audit of all customer contracts for a private equity backed software company to determine the amount of uncollected sales & use tax. Created a contract review checklist and policy manual for the sales and finance teams to use on a go-forward basis. Streamlined Salesforce and NetSuite processes for invoicing.
- Supported a high-growth construction company with AP and AR clean-up in preparation for several acquisitions. Began by digging into multiple CRM and accounting systems to track aging and clean-up customer accounts and misapplied payments. Worked through a heavy backlog of vendor invoices, clearing out the AP inbox and pushing accounts through the approval process to payment. Worked closely with the interim controller and CFO to manage vendor relationships.
- Supported private equity-backed healthcare technology company on NetSuite with ad-hoc balance sheet cleanup due to an abrupt Sr Accountant departure, focused on AP processing, vendor management, expense management, and AR, including billing and customer communication.
- Monitored and analyzed \$3 million operating budget, providing revenue and variance trends to Board of Directors. Conducted & managed monthly bank reconciliations. Partnered with Enrollment and Operations to develop robust financial business plan with detailed benchmarks and action plans.
- Supported a \$20 million operating budget of a national nonprofit, overseeing the creation and development of purchasing and AP workflow. Created, revised, and implemented business policies to improve culture of organization. Managed and reconciled balance sheet. Experienced in managing fixed assets.
- Reviewed and negotiated vendor contracts. Provided cash-flow analysis to executive leaders, invoiced customers, and monitored A/R aging reports. Created customer sales database to increase transparency of real-time data between operations and sales. Extensive month-end close, financial statement preparation, budget to actual comparisons, bank and credit card reconciliations, and vendor management experience.
- Completed production and distribution audit analyses, resolved external audit findings, and managed month-end data analysis.
- Managed payroll functions & implementations for small to mid-size companies, monitored & reconciled 941 quarterly and annual payroll tax fillings. Oversaw 401k, medical, dental, and vision programs.

### PROFESSIONAL CHRONOLOGY

2022 – Present	Professional Services Consultant, <i>Vaco</i>
2021 – 2022	Finance Director, <i>Follow the Child Montessori</i>
2015 – 2021	Staff Accountant, <i>National College Advising Corps, Inc.</i>