

Lead CPA Consultant

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📍 123 Main Street, Columbus, OH 43215

STRENGTHS

💡 Analytical Thinking

Critical thinking leads to innovative solutions in complex financial landscapes. Colleagues appreciate this approach.

Communication Skills

Articulating intricate concepts clearly enhances collaboration and builds trust with stakeholders.

 Training Development

Veteran in designing and delivering impactful financial training, boosting team competency and morale.

 Regulatory Knowledge

Expertise in compliance drives adherence to evolving standards, earning recognition from regulators and peers.

☰ Project Management

Possesses a talent for managing multiple fiscal projects simultaneously, ensuring all meet stringent timelines.

SKILLS

GASB Standards

Municipal Accounting

ACFR Preparation

Financial Analysis

Compliance Management

Training and Development

Project Management

Advisory Services

Policy Evaluation

Audit Coordination Disclosures

Cash Flow Statements

Technical Assistance

Federal Awards Financial Software

SUMMARY

Dedicated financial consultant with over 7 years of experience in governmental accounting and financial reporting. Proven expertise in preparing Annual Comprehensive Financial Reports (ACFR) and ensuring compliance with GASB standards. Strong analytical skills complement a commitment to delivering high-quality financial insights. Involvement includes advising municipal staff on accounting practices, leading training sessions, and ensuring meticulous adherence to compliance regulations, thereby enhancing stakeholder confidence. Eager to support municipal financial reporting and deliver accurate, timely advisory services while contributing positively to team dynamics and outcomes.

EXPERIENCE

Senior Accounting Consultant

City of Columbus 📅 June 2020 - Present 📍 Columbus, OH

Serve as lead consultant for ACFR preparation, focusing on accuracy and compliance with GASB standards. Collaborate with diverse teams on various financial projects and initiatives, driving successful outcomes across the organization.

- Led preparation of Annual Comprehensive Financial Report, ensuring strict adherence to GASB standards.
- Reviewed trial balances, debt schedules, and completed financial reports, identifying discrepancies for resolution.
- Developed tailored training programs for city staff, enhancing comprehension of municipal accounting practices.
- Analyzed federal awards disclosures, enforcing compliance with audit mandates and promoting transparency.
- Collaborated with finance teams on cash flow statements, enhancing overall financial forecasting capabilities.
- Provided technical assistance during transitions to new financial reporting standards, ensuring seamless integration within existing workflows.

Accounting Manager

Metro Financial Services 📅 January 2017 - May 2020 📍 Cleveland, OH

Oversight comprehensive financial report preparations, navigating optional state submission nuances. Ensured all documents complied fully with regulations through detailed review processes and team engagements.

- Managed preparation and submission of financial documentation for municipal compliance, exceeding deadlines.
- Evaluated and revised financial policies, resulting in notable improvements in operational efficiency.
- Trained accounting personnel on effective utilization of financial software and reporting systems, fostering progressive workplaces.
- Performed audits of financial submissions reflecting both state and national regulatory compliance standards.
- Consulted on financial management strategies, enhancing capacity for reporting effectiveness among municipal clients.
- Championed adoption of new accounting software, improving accuracy in reporting and reducing processing times significantly.

Financial Analyst

State of Ohio 📅 March 2015 - December 2016 📍 Columbus, OH

Assisted in preparing Annual Comprehensive Financial Reports, spotlighting compliance with both local and state regulations. Contributed to financial analytics, making meaningful recommendations that improved workflows and outputs.

- Facilitated ACFR development, prioritizing precision and alignment with the state's policy goals.

LANGUAGES

English	Native
Spanish	Proficient

MY CAREER



- Senior Accounting Consultant at City of Columbus (6.1 Years)
- Accounting Manager at Metro Financial Services (3.3 Years)
- Financial Analyst at State of Ohio (1.8 Years)

- Conducted nuanced financial analysis on Schedule of Expenditures of Federal Awards, streamlining reporting processes.
- Reviewed financial documents for compliance adherence, spotting critical areas for amelioration.
- Teamed up with cross-functional units to refine financial reporting processes, diminishing turnaround time.
- Supported audit efforts by orchestrating document readiness and addressing inquiries swiftly.
- Constructed financial forecasting models assisting resource allocation and budgeting decisions downstream.

LEADERSHIP & AWARDS

- Recognized as Top Financial Consultant for exceptional performance and client service in 2021.
- Awarded Outstanding Team Player by City of Columbus for contributions towards improved financial practices.

EDUCATION

Bachelor's Degree in Accounting
Ohio State University 🎓 GPA: 3.8 📅 2014 📍 Columbus, OH
***Coursework:** Financial Reporting, Governmental Accounting, Audit Procedures, Compliance Standards*

CERTIFICATIONS

- Active CPA License 📅 2023

TECHNICAL SKILLS

- **Accounting Principles:** GAAP, IAS, GASB
- **Financial Software:** QuickBooks, Oracle, SAP
- **Reporting Tools:** Excel, Tableau, Power BI
- **Project Management Tools:** Trello, Asana, MS Project
- **Compliance Standards:** GAGAS, OMB Circular A-133, SEC Regulations
- **Data Analysis:** SQL, R, Python
- **Presentation Tools:** PowerPoint, Google Slides, Canva
- **Accounting Training:** Workshop Facilitation, e-Learning, Apprenticeship Programs
- **Analytical Techniques:** Variance Analysis, Trend Analysis, Forecasting Models
- **Municipal Reporting Systems:** Uniform Accounting Network, SAGE, PERS

PROFESSIONAL AFFILIATIONS

- Member of the American Institute of CPAs (AICPA), committed to ongoing professional development.
- Actively involved in the Ohio Society of CPAs, supporting advocacy and education in the profession.

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST