

Professional Profile

Analytical and knowledgeable accounting professional with 8 years of experience at venture-backed companies across various life cycle stages from research and development to clinical studies to product manufacturing. Adaptive individual who masters new skills as needed to be successful whether that is the intricacies of international shipping requirements or an electronic quality management documentation system.

Skills Summary

Financial Reporting

- Complete monthly banking and balance sheet reconciliations (fixed assets, prepaid expenses and deferred revenue).
- Perform routine journal entries and budget to actual analysis in accordance with GAAP principles.
- Maintain financial workbook for budgeting, cash flow management, analyzing priorities and forecasting needs.
- Prepare monthly and quarterly financial reports to meet specific investor requirements.

Audits

- Facilitate annual financial audits with external audit firms through electronic organization of information, preparing reports and schedules, and providing supporting documentation.
- Perform analyses as required to respond to auditors' inquiries.
- Communicate with auditors to explain company's financial and accounting policies and procedures.

Accounts Receivable

- Monitor accounts receivable aging and follow up with customers as needed to ensure timely collection of balances.

Accounts Payable

- Process invoices using paperless approval workflow and maintain paperless filing system for all financial documents.

Taxes

- Prepared tax forms and filings (1099's, 3921's, Form 720, sales and use tax filings).
- Completed schedules as required by tax firms for income tax preparation and foreign tax filings.

Human Resources

- Manage multiple payroll processing periods and systems including international employees/consultants.
- Make tax payments as required and process benefit plan contributions (401k, HSA) in a timely manner.
- Coordinate employee onboarding documentation and benefits administration.

Work Experience

Mar 2014 – present **Accountant**, TECHCXO, LLC, Research Triangle Park, NC

- Mar 2014 – Feb 2015: Clients included Vascular Pharmaceuticals, CivaTech Oncology and 6fusion USA
- Feb 2015 – Feb 2017: Left as an employee to work directly for 2 clients
- Mar 2017 – present: Returned to TechCXO to accept new clients in addition to my existing clients

Jan 2017 – present **Accountant**, ARTIZAN BIOSCIENCES, INC., Durham, NC

- Organized set up of financial software, payroll processes and cloud storage systems for new start-up company

Feb 2015 – present **Controller**, 6FUSION USA, INC., Raleigh, NC

- Transitioned accounting systems to paperless processing and converted to electronic payments to streamline vendor payments and improve efficiency.

Feb 2015 – present **Accountant**, VASCULAR PHARMACEUTICALS, INC., Durham, NC

- Processed quarterly payments to over 40 investigational sites during Phase 2 clinical trial.
- Administered human resources and insurance termination processes when company ceased active operations.

Jul 2009 – Feb 2014 **Administrative Manager**, HYPERBRANCH MEDICAL TECHNOLOGY, INC., Durham, NC

- Delivered international customer service and order fulfillment including inventory management, shipping arrangements, AES filings and customs documentation. Maintained quality system documentation of all orders shipped. Organized and prepared regulatory documentation for product registration in various countries.

Sep 2007 – Aug 2008 **Assistant Director**, STRETCH-N-GROW, Cary, NC

- Managed finances – input data into Quickbooks, reconciled bank statements, processed payroll and customer payments. Marketed program and updated business plan. Developed and taught children's fitness classes.

Jun 2006 – April 2014 **Bookkeeper**, Cary, NC

- Bookkeeping services for several small business clients: a youth fitness service company, an independent compounding pharmacy, a wedding stationery boutique and an independent insurance agent.

Oct 1996 – Jun 1999 **Marketing Manager**, WESTFIELD COMPANIES, Westfield Center, Ohio

- Managed territory of 30 agencies in North and Central Florida. Booked \$1,000,000 in new commercial business premium in both 1997 and 1998.

Jun 1994 – Sep 1996 **Commercial Underwriter**, WESTFIELD COMPANIES, Westfield Center, Ohio

- Evaluated and processed approximately 3600 commercial insurance policies ranging in premium from \$100-\$7500. Completed intensive six-month training program for marketing managers and underwriters.

Education

WITTENBERG UNIVERSITY, Springfield, Ohio **Bachelor of Arts**, Business Administration, June 1994

Honors: Graduated Cum Laude (3.6 GPA), Wittenberg University Scholar, Dean's List (6 terms), Honors Program

Activities: **Editor**, *The Witt* yearbook (9/92-6/94), **Editor-in-Chief**, *The Wittenberg Torch* newspaper (9/93-11/93)

Volunteer Experience

LONGLEAF SCHOOL OF THE ARTS, Raleigh, NC

VP – Arts, Longleaf School of the Arts Association, July 2017 – present

Parent Advisor, *The Forager* Yearbook, September 2014 – present

Member, Marketing Committee of the Longleaf Board of Directors, September 2016 – present

SCHOOL ORGANIZATIONS

President, CARNAGE MIDDLE SCHOOL PTSA, Raleigh, NC, July 2014 – June 2016

Treasurer, CARNAGE MIDDLE SCHOOL PTSA, Raleigh, NC, July 2013 – June 2014

Treasurer, ADAMS ELEMENTARY PTA, Cary, NC, July 2009 – June 2011

Treasurer, KINGSWOOD ELEMENTARY PTA, Cary, NC, August 2006 – April 2007

Spring Fling Coordinator, KINGSWOOD ELEMENTARY PTA, Cary, NC, 2006, 2007, 2008

Parent Teacher Partnership Co-Chair, CARY PRESBYTERIAN PRESCHOOL, August 2006 – April 2007

Parent Teacher Partnership Chairperson, CARY PRESBYTERIAN PRESCHOOL, August 2005 – May 2006

SCOUTING ORGANIZATIONS

Troop Cookie Manager, GIRL SCOUT TROOP 990, Cary, NC, 2013, 2014, 2015

Den Leader, BOY SCOUT PACK 200, Cary, NC, August 2009 – February 2013

Troop Cookie Manager, GIRL SCOUT BROWNIE TROOP #38, Cary, NC, December 2006 – March 2007

Troop Treasurer, GIRL SCOUT BROWNIE TROOP #38, Cary, NC, October 2006 – April 2007

MOTHERS & MORE, Cary, NC

Playgroup Director, November 2003 – October 2004

Newsletter Editor, March 2001 – September 2002

Treasurer, November 2000 – October 2001

Other Skills/Experience

North Carolina Notary Public – Commission Expires October 15, 2017

Computer Skills

- Proficient in both Mac & PC environments
- Microsoft Office Suite (Excel, Word, Powerpoint)
- Quickbooks (Enterprise Solutions, Online, & Pro)