

## EXECUTIVE SUMMARY

A high performing **business operations expert** with 6 years of experience in accounting, finance, operations analysis, and sales roles. A collaborative partner used to working on teams and making an impact by creating and implementing lasting improvements to the accounting, analysis, forecasting, and sales processes of firms.

## FUNCTIONAL EXPERTISE

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- **Cost Accounting and Technical Analysis**
- **Financial Planning and Forecasting**
- **Accounting, Audit, and Compliance**
- **Cross-functional Communication**
- **Process Improvement and Problem Solving**
- **Leadership and People Management**

## FUNCTIONAL EXPERTISE DEMONSTRATED

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JONES LLP

Summer 2020 (Internship) / 2021 – Present

Jones is an international accounting network with more than \$4.2 billion in global revenue.

### **Experienced Assurance Associate**

Performed internal audits, working in teams of 4-12 to evaluate risk management, control, and governance systems and provide recommendations for improving the organization's performance.

- **Accounting, Audit, and Compliance:** Successfully completed 10 audits for public, private, and non-profit entities with average annual revenues/funding of ~\$400 million, specializing in cost accounting, revenue accounting, and SEC compliance for consumer and semiconductor manufacturing operations.
- **Process Improvement and Problem Solving:** Led a special engagement with a consumer manufacturing and retail operation with ~\$200 million in annual revenues to merge 3 inventory management systems, streamlining them into a single ERP to improve supply chain efficiency and data management practices.
- **Leadership and People Management:** Promoted into a team leadership role, leading the review of all modules in preparation for a client's 10-K filing and enabling Jones to allocate the project's senior associate to a priority foreign assignment.

JONES FAMILY VINEYARD

2017 – 2020

A 5,000-acre vineyard, winery, and tasting room founded in 1994 that produces and sells ~30,000 cases of Jones-branded wines annually.

### **Accounting and Information Analyst / Salesperson**

Started in the tasting room, serving ~120 groups of clients per week and making outbound sales solicitations to a book of ~1000 clients. Promoted into a more analytical role, performing sales forecasts, conducting cost accounting analyses, creating financial plans, finding process improvements, and leading special projects.

- **Cost Accounting and Technical Analysis:** First to develop Bill of Materials (BOM) and Inventory Waterfall systems for the Organization, automating these systems into a Management Decision System (MDS) that enabled company leadership to more-accurately assess the economic viability of products.
- **Financial Planning and Forecasting:** Developed the Organization's sales forecasting and performance management system, creating an interactive forecasting tool in MS Access and VBA that was used in concert with company salespeople to generate probability-weighted forecasts of the sales from ~1,000 customers.
- **Process Improvement and Problem Solving:** Led the formalization and implementation of standard operating procedures in the Organization's accounting department, working with Jones' business manager and

the AP department to implement GAAP-compliant accounting practices.

- **Cross-functional Communication:** Worked cross-functionally with Jones salespeople and representatives from the Company's distributor to identify selling opportunities. E.g. went on 6 "ride withs" per month with representatives from Wine Distributors, the Company's distributor, visiting ~50 key accounts in San Diego, Los Angeles, the Central Coast, and the SF Bay territories. Personally billed over \$70,000 in sales in 2019.

*Previous Roles:*

Jones Contracting, San Francisco CA—Team Leader (2012 – 2017)

Reese & Associates, Palo Alto CA—Accounting Student Intern (2010—2012)

## **EDUCATION**

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**BA in Accounting (Minor: Economics) *Cum Laude*.** California Polytechnic State University (San Luis Obispo, CA)

## **OTHER RELEVANT INFORMATION**

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**Certifications:** CPA—Experience requirement met, 3/4 tests complete. Expected certification October 2013.