

Profile

General Accounting • Financial Reporting • Project Management • Team Leadership

Highly energetic, personable and results-oriented professional, combining a strong academic record with a demonstrated work record of consistently meeting and exceeding organizational goals. Proven ability to perform core accounting functions including financial transactions, general ledger tasks, monthly closings and financial statements. Resourceful in troubleshooting problems and implementing solutions with excellent communication and organizational skills. Work well both independently and as a team member. Exercise confidentiality and discretion where appropriate or required.

Core competencies: Financial Analysis • Financial Statements • General Ledger • Accounts Payable/ Accounts Receivable • Payroll • Reporting • Customer Service • Purchasing • Process Improvement • Training & Staff Development

Education

MID-STATE TECHNICAL COLLEGE, Wisconsin Rapids, WI 2017

Associate in Applied Science Degree, Major: Accounting

- GPA: 3.52
- Selected coursework: Accounting I, II and III, Payroll Accounting, Introduction to Business, Microsoft Office Introduction, Income Tax Accounting, Business Law, Managerial Accounting, Macroeconomics, Microeconomics, Accounting Systems.

Professional Experience

ALL-PRO HVAC SYSTEMS, Marathon, WI 2014–Present

Accountant/Team Lead

Oversee the processing of accounts receivable, accounts payable and collections, and the reconciling of monthly bank statements. Assist with compiling and preparing quotes and estimates. Schedule and assign work. Supervise a team of three staff members.

- Perform general ledger operations, journal entries and monthly closings and compile monthly financial statements.
- Process weekly payroll for union and non-union employees along with related payroll tax filings and union fringe benefit reporting and payments.
- Serve as a liaison with insurance companies for employee benefits, workers comp, and property and auto liability claims.
- Collaborate with project technicians and customers to determine work type and job materials needed; prepare material orders from vendors.
- Conduct staff training and annual performance evaluations.

NEW HORIZON BENEFITS, Brookings, SD/ALLIED CARE, Mankato, MN 2010–2014

Independent Consultant

Performed project management as an independent consultant for an insurance company (New Horizon Benefits) and a regional healthcare provider (Allied Care).

- Led the installation of a new cost accounting system, (Allied Care).
- Spearheaded the implementation of a new claims payment installations (New Horizon Benefits).
- Guided the interfacing of new systems to operate with other software/hardware requirements (New Horizon Benefits and Allied Care).
- Developed and conducted staff training programs (New Horizon Benefits and Allied Care).
- Designed ad hoc reports to meet operational and financial requirements (New Horizon Benefits and Allied Care).
- Completed a number of smaller scale projects involving various operational and financial areas for OptimaCare Health Plans and Meyer Bredden Associates.

Professional Experience, Continued

INTEGRATED INSURANCE GROUP, St. Paul, MN

2000–2010

Claims Specialist (1997–2000)

Managed the processing of life, medical, dental, and short- and long-term disability claims for policyholders, third-party administrators, preferred provider organizations and health maintenance organizations. Served in a team lead role for projects as assigned.

- Improved efficiency through several reorganizations of departments and operations.
- Implemented new administrative practices, job and salary definitions, and productivity and quality standards resulting in claims turnaround under five days and claims accuracy of 98%.
- Established cost savings programs for large case management, fee negotiations and peer review, resulting in a 30% reduction of actual claim expenses.
- Co-developed and implemented a program for new hires to improve productivity and claims processing accuracy and overall quality.

Claims Specialist I (1994–1997)

Performed in a support role for the processing of life, medical, dental, and short- and long-term disability claims for policyholders, third-party administrators, preferred provider organizations and health maintenance organizations.

- Participated as a team member in a pilot program that reduced claims processing errors and that contributed to an increase in loss settlements of 2.5%.
- Promoted to Claims Specialist in 1997.

Volunteer Experience

THE COMMUNITY BOOKSTORE, Marathon, WI

2014–Present

Volunteer

Served as a volunteer manager of this small used bookstore at a local church. Responsibilities included book selection and purchasing, inventory maintenance, and sales and use tax processing.

Computer Skills

Proficient in Microsoft Word, Excel, Outlook and PowerPoint as well as computerized accounting systems including QuickBooks, Peachtree and Estimation.