

## Executive Summary

Financial Manager with extensive hands-on experience in financial analysis, management, business leadership and working with Agency Directors, Banks and Attorneys. An MBA with an established record of success in significantly growing enterprise value. Strong in budgets, cash forecasts, and financial data analysis and reporting: Areas of expertise in:

- Financial & Strategic Planning
- Banking & Cash Management
- Budget Development & Management
- Accounting & Financial Operations
- Staff Management & Development
- Complex Business & Tax Issues

Initiate develop and direct administrative operations providing quality assurance and quality control. Responsible for managing personnel activities which include recruiting, hiring, reclassifications/promotions and salary management. Demonstrated organizational and negotiation skills and the ability to prioritize multiple and complex tasks, often with conflicting deadlines. Proven ability to work independently as well as perform as a team member. Exercise a high degree of discretion, mature judgment, and tact in handling issues of sensitive nature. Advanced knowledge of personal computers and associated software applications including Excel, Power Point, Word, and Access. Strong leadership, problem-solving, planning, team building and project management skills.

## Professional Experience

Global Tax Solutions Incorporated  
January 2, 2018 – Present  
McLean, VA – U.S.A

### *Owner*

As owner of the firm. It's my responsibility to work with clients towards achieving the goals set for firm for growth, integrity, governance, and quality control.

Tax Planning & Preparation and Write-Up services:

- Business Tax Services
- Individual Tax Services
- State & Local Tax Consulting
- Non-Profit Tax Consulting
- International Business & Tax Consulting
- Client Write-up services

Government of the District of Columbia  
Office of the Chief Financial Officer  
November 2003 – January 2019  
Washington, DC - U.S.A.

### ***Financial Manager***

Responsible for the direction and supervision of all accounting, forecasting, budgeting activities, maintenance of financial records and preparation and interpretation of financial reports for several district government agencies.

- Made assessments of business performance using growth metrics, vertical/margin analysis, budget/forecast comparisons and monthly reporting
- Administered the Business unit's fiscal record keeping.
- Maintained cash accounts, budgets, and government reporting.
- Prepared financial reports for executive management.
- Administered district government agencies accounting system to maintain financial records.
- Developed, planned, and recommended practices and procedures for proper financial control of agency units.
- Monitored inter-agency accounting reports.
- Participated in weekly, monthly and special management meetings and provide recommendations to improve agency financial performance.
- Interacted with other managers to provide consultative support to planning initiatives through financial and management information analyses, reports, and recommendations.
- Developed and direct the implementation of strategic business and/or operational plans, projects, programs, and systems.
- Analyzed cash flow, cost controls, and expenses to guide agency directors. Analyze financial statements to pinpoint potential weak areas.
- Recommended benchmarks for measuring the financial and operating performance of divisions and departments.
- Assisted in the establishment and implementation of short- and long-term departmental goals, action plans, objectives, policies, and operating procedures

Brown & Company, CPA's, PLLC  
February 1997 – November 2003  
Washington, D.C. - U.S.A.

### ***Accounting Manager***

- Managed the preparation and distribution of financial statements, SEC reporting/filing, maintaining the highest quality, reliability, and accuracy
- Coordinated monthly reporting of financial information to all field operations
- Co-managed the external and internal controls audits
- Developed and maintained the integrity of the financial reporting process. Performed tests of internal controls to ensure effectiveness and compliance
- Coordinated, developed, and updated written policies and procedures over the financial reporting process
- Coordinated, develop and update flowcharts over the financial reporting process
- Oversaw financial information and communications systems, ensuring the highest accuracy
- Research and resolution of accounting issues including evaluation and implementation of new accounting pronouncements
- Planned, designed, and directed the production of financial and regulatory reports
- Managed responded and resolution to audit inquiries
- Influenced and negotiated with senior management on issues of policy or strategic direction
- Managed complex accounting projects in support of business goals

### ***Senior Accountant***

- Oversaw accounts Payable and Receivable entries into the accounting software
- Resolved vendor issues & customer issues.
- Made collection calls on past due customers.
- Posted customer & other payments into accounting system and cash flow report.
- Prepared customer invoices for select customers
- Updated weekly reporting information for AP, Checks and Cash
- Processed ADP payroll and employee expense checks
- Prepared monthly payroll accrual and enter into accounting software.
- Assisted accounting manager with the month end closing journal entries, month end account reconciliation and financial audit information preparation for the auditors
- Oversaw and managed all the accounting files.

Wells Fargo Bank, NA  
May 1994 – February 1997  
Washington, D.C. – U.S.A.

### ***Branch Manager***

- Planned, organized, directed, controlled, and evaluated the branch operations of the bank
- Ensured the institution's policies and procedures are followed according to established guidelines and make recommendations for improvement
- Networked to develop business relations, promoted the sale of loan, investment and other banking services, and attract corporate and individual customers
- Interviewed corporate and individual customers and respond to customer enquiries
- Analyzed, reviewed, and approved or rejected loan and credit applications in accordance with authorized limits
- Monitored processing of loan applications and credit investigations
- Oversaw preparation of monthly financial and branch progress reports
- Recruited personnel and identify their training needs.

Bank of America, NA  
March 1992 – April 1994  
Washington, DC - U.S.A.

### ***Assistant Branch Manager***

- Developed new clients and expanded relationships with existing clients
- Referred clients to different subsidiaries of the bank
- Conducted various audits to include tellers, monetary instruments, and foreign currency
- Performed the duties of the banking center manager when necessary

PNC Bank, NA  
June 1990 – March 1992  
Virginia - U.S.A.

### ***Customer Service Representative***

- Consulted with clients and determined type of accounts they will suite their needs
- Assisted clients understanding their bank statements
- Prepared weekly reports of new accounts and loans
- Conducted various audits to include official checks and teller audits
- Interviewed clients on consumer loans and processed applications.

## **Academic Experience**

Strayer University  
July 2002 – March 2011  
Lorton, Virginia - U.S.A.

### ***Adjunct Professor of Finance***

- Taught various levels finance courses to graduate and undergraduate students
- Presented lectures using MS-PowerPoint
- Assigned and graded homework problems, quizzes and exams
- Measure each student performance individually, and provide continuous feedback of strengths and weaknesses, encourage and assist students to improve their performance

## **Education**

Southeastern University     ***MBA in Financial Management***  
Washington, DC – U.S.A.     June 1996

Southern Illinois University     ***BA in Economics***  
Illinois – U.S.A.     May 1990

## **IT Skills**

Proficient in MS-Office software; QuickBooks; Work Paper Plus Trial Balance Software; Check Mark's MultiLedger; Drake, ProSeries and Lacerte Tax Accounting Software, PASS, PeopleSoft and SOAR