

Versatile diverse professional with:

- Experience working with students in my first semester of the TRU education program during my practicum.
- Over 8 years of accounting experience with high volume fast paced environments
- Skilled individual exhibiting excellent time management skills, capable of learning new skills quickly especially with computer software, and a strong team player built from accounting designation courses, university, previous employment, and education practicum.
- Professional and personable working with staff, clients, supplies and contractors, and students.
- Utilized versatility and strong interpersonal skills at Western Society for Children (WSFC), Westland insurance, Sunshine coast appliance and mattress, as well as in the CPA program, and SFU Schools of Business, to generate ideas and collaborate effectively to direct and complete projects on time.
- Team experience in producing and coordinating group presentations such as one SFU course where we presented 2 seventy-minute presentations; each team member knowing their slides, smoothly handing off between members, and being prepared for which sections they held responsibility for during Q&A but being willing to step in if a team member needed assistance.

WORK EXPERIENCE

Sunshine Coast Appliance & Mattress

Sechelt, BC

June 2022 – Sept 2023

Assistant Manager

- Work with customers to ensure their satisfaction and happiness with their products and the store, from the sales such as giving information when salespeople were busy or didn't know, to delivery making sure the deliveries were scheduled properly, to helping with warranty claims if the product had any defects.
- Filling in gaps in the store, working in sales when salespeople were too busy or sick, working in the warehouse to organize product or bring it out for customer pickup when delivery guys were out on a run, to managing the store when manager was sick.
- Coordinating with fellow employees in order to make sure everyone had the latest information on products, specials, specifications, etc.
- Consulting with manager and salespeople to review what products were selling and how to shift which products were carried in what quantities to maximize customer satisfaction and store performance.

Westland Insurance Group

Sechelt, BC

June 2019 – May 2022

Insurance Advisor

- Prepare insurance quotes for customers, asking questions to fully understand their situation and what their needs and budget is for Auto and Travel insurance.
- Coordinating with fellow employees in order to make sure I or them had the best information to serve the customers best interests and give them the best service possible.
- Contact ICBC or other insurers on behalf of client in order to obtain insurance quotes, pay balances owing, resolve disputes, obtain information, or help to process customer requests in order to give the best service possible and to act as an intermediary to translate information into understandable wordings.
- Work at drivers services desk helping customers with drivers licensing based issues such as processing renewals, paying debts, finding out the source if issues in obtaining drivers licenses, medical cards etc, converting out of province/country drivers to the BC system, and helping clients organize for written and physical tests.
- Organize inventory to make sure there were no discrepancies so that stock met ICBC requirements and if there were any discrepancies tracing their origin and resolving them.
- Explained our services and pricing to the customer so that they understood and appreciated the value they received.
- Corresponded with customers on the phone, in person, as well as through email in order to organize their appointments, as well as when they needed to correspond through those mediums to undertake their insurance preparation and payment.

Sunshine Coast Appliance & Mattress

Sechelt, BC.

Sept 2018 – Dec 2019

Accountant & Warehouse worker

- Enter accounting transactions
- Reconcile balance sheet every month against bank statements
- File warrantee sales/information online
- Move freight within and between warehouses
- Load and deliver items to customers
- Help with data entry and other office items
- Clean and organize warehouses

Alvarez & Co

Gibsons, BC

Jan 2018 – Aug 2018

Tax accountant & Bookkeeper

- Tax preparer doing T1 returns of all difficulty
- Bookkeeper handling 8 companies
- Preparing T1 returns, including ones with rental, & business operations; getting to know the clients and learning what their situation was in order to maximize their return/minimize their amount owing and in a way that optimized their experience with the company to achieve customer satisfaction and retention.
- Communicating with bookkeeping clients, making sure they knew the status of their work and that I had all required information to give them the best return and least tax payable as well as making sure their filings were completed on time and that they received printouts of those filings for their review or if they paid themselves.
- Increased profitability through management of clients and staff, increasing the number of clients served by me and catching up clients that were backlogged and risking dissatisfaction through lack of communication with the office.
- Fixing incorrect work of previous bookkeepers so that clients books were accurate, understandable, and without errors that could cause clients to question the service they were being provided.

Wood PLC formerly AMEC Foster Wheeler

Vancouver, BC

Jan 2015 – Dec 2017

Accounts payable supervisor & Project accountant

- Accounts payable coordinator for the Vancouver office
- Accounts receivable project accountant handling over 60 jobs
- Handling of vendors, Contractors, and employee's invoices and expense reports.
- Complete all aspects of accounts payable including coding, data entry, and processing cheque and cash receipts weekly
- Calculation and input of billing rates.
- Month end reports, Aging report, Weekly utilization report, Accounts reconciliation.
- Communication with vendors and clients regarding any questions or concerns they may have as well as following up with them if they have any invoices overdue to AMEC FW.
- Record and deposit cheques and cash receipts on a weekly basis, then process them into the system utilizing Penta, making sure they are processed against the correct invoices in the correct currencies and finally emailing the information to head office A/R.
- Record and process cheques as well as cash receipts on a weekly basis Create and complete monthly invoices, ensuring contractual compliance, and ensuring costs/revenue are correct.
- Create accruals for costs/revenue that need to be billed in the current period, or to move amounts between projects.

Accountemps

Vancouver, BC

Aug 2014-Jan2015

Full Cycle Accountant

- Full cycle accounting duties including data entry, preparing and sending invoices, processing payment receipts, and payroll.
- Statement reconciliation and communication with vendors, contractors, and clients.
- Bank reconciliation, Cash handling, and Weekly timesheet summarization, processing into the system and payment to employees.

WESTERN SOCIETY FOR CHILDREN (WSFC)

New Westminster, BC

Apr 2012 – Present

Board of Directors Treasurer

- Analyze financial information from balance sheets, income statements and budgets to update and improve the accounting system for the CEO as well as other board members; tracking how WSFC spends its donation funds, and modifying its budgets for the future, both for internal use and for potential donors.
- Research material to better understand the organization and its needs so that we can plan for the future, through better understanding the costs associated with raising disabled children as well as potential revenue sources, and their viability.
- Meet with the CEO, staff, and board to brainstorm on details of operations, what is going on and needs to be going on for idea's, projects, potential grants, and on how to best get WSFC's message, existence, and vision known to the public.

H&R Block

Vancouver, BC

Feb – May 2014/2015/2016

Office Leader / CSR / Tax Preparer

- Increased profitability through management of clients and staff, increasing the number of clients served without having them waiting for undue lengths and becoming dissatisfied. This resulted in our office being commended for having the best increase in customers served versus 2013 for a large location.
- Prepared personal taxes for customers, getting to know them and leaning what their situation was in order to maximize their return/minimize their amount owing and in a way that optimized their experience with the company to achieve customer satisfaction and retention.
- Explained our services and pricing to the customer so that they understood and appreciated the value they received.
- Corresponded with customers on the phone as well as through email in order to organize their appointments, as well as when they needed to correspond through those mediums to undertake their tax preparation process and payment.

EDUCATION

TRU Department of Education

Kamloops, BC

Bachelor of education

In progress

CPA Certified Professional Accountant Candidate

Vancouver, BC

CPA Western School of Business program

Partial completion

Simon Fraser University

Burnaby, BC

BBA Degree, Concentration: Accounting