

# CPA

Address: Nowheresville  
E-mail: XXX Cell: XXX

## EDUCATION

---

### Non-Target University

*Bachelor of Science with honors in Accounting and Finance*

- **GPA:** 3.78
- **Honors:** Magna Cum Laude, Dean's List (2008-2012), Excellence in Finance Recipient, Finance Leadership Award, Accounting Honors Graduate, Accounting Advisory Merit Scholarship Recipient
- **Related Coursework:** Intermediate Accounting I & II, Financial Statement Analysis, Assurance & Audit Services, Forecasting and Valuation, Advanced Financial Management, Advanced Taxation

## WORK & LEADERSHIP EXPERIENCE

---

### National CPA Firm

09/2012 – 11/2013

Staff Consultant

- Analyzed past and present financial results to quantify damages in federal litigation valued at \$5M
- Evaluated and restructured complex transactions valued at \$251M to maximize allowable billings in federal contracts
- Audited contract covenants, financial statements, invoices, and operational controls for fraud and compliance
- Gathered information from key stakeholders to understand operations, identify risks, and improve business processes

### 2<sup>nd</sup> Tier Wealth Management Firm

Wealth Management Intern

05/2012 – 09/2013

- Assisted in the modeling, asset allocation, and rebalancing of investment portfolio with over \$250 million AUM
- Conducted the due diligence and financial statement analysis for product recommendations including: mutual funds, ETF's, and fixed income and equity securities
- Evaluated portfolio risk by validating cash flows and expense assumptions, and conducting scenario analysis and Monte Carlo simulations

### CFA Investment Research Challenge

08/2011 – 01/2012

Regional Finalist - Team Lead

- Placed in top 3 regionally in a professionally sponsored international investment research competition
- Researched economic trends, credit ratings, industry reports, and financial statements to corroborate a valuation and investment recommendation for a publicly traded company
- Constructed and presented analyst report including: forecasted financial statements, discounted cash flow, comparable transactions, and relative valuation analysis

### Large Government Contractor

Finance Intern

06/2010 – 05/2011

- Compiled and reviewed financial statements, revenue forecasts, and variance reports
- Lead the implementation of a new A/P business process to improve credit and increase liquidity
- Researched and interpreted technical accounting issues
- Assisted with fiscal-year audit preparation and IRS tax filings

## ACTIVITIES & SKILLS

---

**Activities:** Stock Pitch Competition, Delta Sigma Pi, Beta Alpha Psi, Chavez Professionalism Program, American Red Cross, Consulting Club, Relay for Life

**Skills:** Microsoft Office, Argus, Morningstar, Bloomberg, Schwab, S&P Capital IQ, Certified Public Accountant