

Experienced Financial Professional

Strategic and dynamic business leader with a history of planning, directing, and coordinating accounting functions, overseeing reconciliations, and ensuring documentation is organized to support transactions. Skilled in preparing and evaluating detailed financial statements, overseeing the budget process, and training incoming personnel in processes and procedures. **Seeking a position that focuses on continuous growth, organizational success, and making a positive business impact.**

Skills & Qualifications

Emotional Intelligence
Strong Communication Skills
Adaptability and Flexibility
Cross-Functional Teamwork

Motivational Leadership
Innovative Problem Solving
Critical Decision Making
Continuous Learning-Focused

Strategic Planning
Customer Service Oriented
QuickBooks Professional
Microsoft Office

Professional History

DUNN RIGHT BOOKKEEPING, LLC, Owner, Menomonie, WI

March 2024 - Current

I have been in finance for over 15 years, from all facets of banking (personal, business and mortgage) to being General Manager of a large diesel repair company. I have experience with inventory management, accounts payable and receivable, payroll, tax reporting, marketing, and building relationships with customers and vendors alike. Having worked for others and making them wealthy, I wanted to take my experience and help many small businesses, rather than just a few.

COUNTY DIESEL & DRIVELINE, LLC, General Manager, Arkansaw, WI

November 15 – April 2024

Steer the company's financial direction via strategic planning, monitoring incoming and outgoing cash flow, and building tracking spreadsheets to optimize resources. Monitor and analyze the Profit/Loss statement, Balance Sheet, Aging Accounts Receivables Report, Unbilled Costs by Job, Technician Efficiency Reports, and other ratios.

- Complete Accounts Payable, Accounts Receivable, bill entry, invoicing, and a variety of reconciliations. Distribute statements to Line of Credit customers and past due customers, assessing interest charges as needed.
- Conceive and implement an inventory process that enhanced proper billing, tracking, profit margins, ordering of inventory parts, parts room organization, and overall cleanliness.
- Collaborate with technicians and managers on discrepancies associated with inventory procedures.
- Maintain and update employee files, monitor benefits packages, process payroll, conduct employee performance evaluations, and provide insights on all HR functions within the organization.

SECURITY FINANCIAL BANK, Retail Banker | Mortgage Originator, Durand, WI

October 2012 – November 2015

Tracked cross-selling and referral goals, researched banking-related topics and provided instruction to bankers, and continually promoted core values with all client and team members interactions. Mentored and coached new bankers on products, practices and procedures, and system fundamentals.

BMO HARRIS BANK, Senior Retail Banker, Greendale, WI | River Falls, WI

May 2010 – October 2012

Delivered exceptional customer service to clients, cross-sold services to elevate sales, and partnered with Customer Service Representatives to increase referrals. Generated long-term relationships with clients and internal Financial Advisors, Business Bankers, and Mortgage Bankers.

Education

Bachelor of Business Administration – Finance, University of Wisconsin-River Falls

Volunteerism

Junior Achievement – Volunteer Recruiter in the Durand-Arkansaw School District; Economics Volunteer for the JA Achievement Business Challenge at CVTC; Teacher for third grade curriculum at Durand-Arkansaw School District

St. Paul's Lutheran Church and School – Church Council Treasurer and Boys Head Basketball Coach