

# SAM SMITH

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## ACCOUNTING MAJOR WITH 2+ YEARS OF FINANCE INDUSTRY EXPERIENCE

### SUMMARY OF SKILLS

A customer-driven and solutions-focused Accounting Major with a proven record of success in assuming increasing levels of responsibility and the quantitative and qualitative aptitude to excel in a challenging role. Quick learner demonstrating a high-level of accuracy and thoroughness. Recognized for ability to manage multiple responsibilities simultaneously, thrive in both independent and collaborative work environments, and establish and maintain solid relationships with co-workers, management, and customers. A troubleshooter able to proactively resolve issues, easily grasp and apply new ideas, concepts, methods, and technologies, and meet and exceed challenging goals and objectives. Superior interpersonal, organizational, analytical, investigative, and problem-solving skills. Strong written, oral, and technical aptitude with broad business and technical knowledge. Microsoft Office proficient.

### CORE COMPETENCIES

- *Financial/Data Analysis*
- *Client Service & Support*
- *Quality Assurance Standards*
- *Report Generation/Drafting*
- *Strategic Market Planning*
- *Business Profit Reporting*
- *Forecasting & Analysis*
- *Sales/Business Development*
- *Regulatory/Corporate Compliance*
- *Performance Review/Assessment*
- *Project Management/Leadership*
- *Budget/Resource Administration*

### EDUCATION

**Bachelor of Science in Business Administration; Concentration in Accounting**  
Sonoma State University, Rohnert Park, California; Graduated: May 2009

### DESIGNATIONS

**Certified Public Accountant License (In Process); Projected Exam Dates: FAR: 11/18/2011; BEC/REG/AUD: 2012**  
Becker Professional Training, Devry University, Sonoma, California

### SPECIALIZED TRAINING & KNOWLEDGE

- Accounting and Reporting for Governmental Entities and Non-Government Not-For-Profit Organization ▪ Business Law
  - Business Structures ▪ Concepts and Standards for Financial Statements ▪ Economics ▪ Ethics
- Federal Tax Procedures and Accounting Issues ▪ Federal Taxation on Property, Individuals, and Entities
  - Financial Management ▪ Identification and Calculation of Transactions
- Identification and Calculation of Various Items in the Financial Statement ▪ Information Technology
  - Investigating Internal Controls ▪ Management/Cost Accounting ▪ Planning the Audit
- Procuring and Documenting the Information Necessary to Complete the Audit ▪ Professional and Legal Responsibility
- Reviewing the Audit; Examining the Information Acquired Therein and Preparing a Written Report for Further Review

### PROFESSIONAL EXPERIENCE

**ABC Company** Any Town, USA Jul. 2009 - Nov. 2011

*Bank Teller/Teller Cash Dispenser (TCD) Custodian*

Assisted customers with daily transactions for a leading global financial services firm specializing in investment banking, financial services for consumers, small business and commercial banking, financial transaction processing, asset management, and private equity.

- Presented and sold company products; provided excellent client service and exceeded customer expectations.
- Received cash and checks for deposit, verifying amounts, signatures, endorsements, and account balances; employed security measures to ensure funds were not compromised.
- Entered client information and transaction data into computer; issued computer-generated receipts.
- Collected loan payments; disclosed account status with respect to uncollected funds in compliance with organizational and government regulations and procedures.
- Posted night and mail deposits, payments, and requests on a daily basis.

#### **Selected Accomplishments:**

- Achieved #1 branch ranking and #2 district ranking for lead referrals, 2011.

### LEADERSHIP/AFFILIATIONS

- Vice-President - Membership, Delta Upsilon Fraternity; Oversaw Finance, Recruitment and Loss Prevention Initiatives
  - Member, Financial Management Association