

# FirstName LastName

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## **Professional Summary**

Accounting student with experience in portfolio accounting, tax preparation, and financial reporting. Skilled in Excel and QuickBooks, with a strong ability to analyze financial data, resolve discrepancies, and support accurate reporting.

## **Education**

### **Bachelor of Science, Accounting**

May 20XX

Towson University, Towson, MD

Overall GPA: 3.75; Major GPA: 3.9

Graduating with 150 hours; CPA eligible to sit for CPA exam, May 20XX

## **Technical Skills**

- Financial & Accounting Systems: QuickBooks, Sage 50
- Data & Analytics: Excel, Tableau, Power BI, SQL

## **Relevant Experience**

### **Portfolio Accountant Intern**

June 20XX – Present

Sunny Road Bank, Baltimore, MD

- Utilize Excel and portfolio accounting systems to verify cash positions and investment activity, maintaining accuracy and regulatory compliance
- Prepare amortization calculations and partnered with portfolio managers and accounting team to investigate and resolve discrepancies
- Calculate net asset amount of funds and compute interest accruals on fixed returns securities
- Develop Power BI dashboards to visualize portfolio performance and support management reporting

### **Accounting Software Intern**

September 20XX – December 20XX

Accountants, Inc., Baltimore, MD

- Consulted with 15 clients on accounting software solutions, conducting product demonstrations, system installations, user training, and troubleshooting
- Collaborated with team of five to develop software applications training curriculum

### **Tax Volunteer**

February – April 20XX

Cash Campaign of Maryland, Baltimore, MD

- Assisted low-income residents with preparing tax returns through a volunteer tax assistance program, reviewing financial documents and ensuring accuracy and compliance with IRS guidelines

## **Leadership Experience**

### **Treasurer**

August 20XX – Present

National Association of Black Accountants (NABA), Towson University, Towson, MD

- Manage a \$2,000 annual budget, tracking expenses and allocating funds to support club events
- Serve as the organization's representative at campus activities treasurers' meetings, upholding adherence to financial policies and funding procedures

### **Assistant Manager**

April 20XX – March 20XX

Chick-Fil-A, Towson, MD

- Trained and managed team of 10 servers by implementing and teaching customer service protocol
- Maintained customer satisfaction scores in the 90<sup>th</sup> percentile for two consecutive years
- Applied solution-focused, problem-solving skills to address customer concerns in a fast-paced environment