

Jeremy C. Whitaker CPA, CFE, CICA

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December 31, 2023

Dr. Jim Prevost
Chair of the Presidential Search Committee
Limestone University
1115 College Drive
Gaffney, SC 29340

Dear Dr. Prevost:

I am humbled and thankful to have the opportunity to apply for the Presidency of Limestone University. I was born in Gaffney and raised in the neighboring city of Blacksburg for most of my formative years. I along with my wife, family, and friends are rooted in Cherokee County. I have witnessed for many years the value that this amazing institution brings to the cities of Cherokee County and most importantly the students she serves. I know this because I was one of those students. I currently serve as Acting President and Vice President of Finance and Administration/CFO of Limestone University. I have accumulated extensive experience over the years that will serve me well as President of this great institution. I have not only developed skills and knowledge around finance, business, academic, and athletic planning but most importantly I learned how to lead a wide range of people. I have learned how to listen and utilize the knowledge in the room. Despite some of the challenges currently facing both Limestone and all private institutions, I view the Presidency of Limestone University as a wonderful opportunity to stabilize, revitalize, and put this special institution on a trajectory that will make her not only one of the finest faith-based institutions in South Carolina but also in the nation.

I came to Limestone in 2017 after leaving the corporate world. I wanted to come to Limestone because I know the value of this institution and I wanted to be a part of something that was more meaningful and bigger than I am. I wanted to be a part of something that changes lives. During my first tenure at Limestone, I was the Controller then I became Interim Vice President of Finance, and then Director of Finance. During this time, I was able to get to know Limestone more in depth. I saw the great opportunities she brought to everyone and the lives that were changed. I was also able to see the areas that needed improvement. These improvements would have made the University financially stable and provided a better service to current students and increased enrollment. I learned about higher education and the advantages and disadvantages of being a private institution. I began to work with different faculty and staff to understand their perspective on how we could improve in those areas. I suggested multiple changes to upper administration. Unfortunately, these suggestions were never acted on; however, I have not forgotten the improvements that were needed. Due to professional differences with the previous administration, I left Limestone at the beginning of 2021.

At the beginning of 2021, I became the Associate Vice President of Finance and Administration of Winthrop University. I learned a great deal during my time at Winthrop. This experience allowed me to see higher education from a different point of view. I had the opportunity to see the advantages and disadvantages of another institution. I was then able to discern what were the advantages and disadvantages for both private and public institutions. The disadvantages revealed how private institutions could have the advantage. I worked closely with the President and Cabinet as part of the Senior Leadership Team. This unique experience allowed me to enhance my leadership and strategic planning skills.

Even at Winthrop, Limestone remained on my mind. As I learned and enhanced my skills there, my thoughts were always, "How can this help Limestone whenever I get back to her?" My intention has always been to return to Limestone because I truly understand who Limestone is and why God has placed her here.

Why do I want the Limestone Presidency?

Candor is one of the most important strengths you can have in business. I learned this in one of my business classes at Limestone and this lesson has helped me become successful throughout my career. To be completely candid, becoming president of a higher education institution is not something I envisioned for myself. The exception is Limestone University because I understand her purpose, mission, and most importantly her ability to change lives. I know this because I have experienced it firsthand. Limestone changed my life in a way I could never imagine and in a way that I will never be able to repay.

I have a passion for this institution, and I believe in her. I returned this past March to an institution that was in the worst financial position she has ever been in. I knew the situation and I still came because I truly believe in the purpose of this institution. I returned knowing there was a chance that I may not have a job within a month. In addition, I am the sole financial support for my wife and children. I returned despite all the risks to my family because I truly understand the difference that Limestone University can make to tens of thousands of students and families. I believe I can lead Limestone University to see her best years yet.

Why me?

Over the past ten months and especially the last four months as Acting President, I have witnessed the faculty and staff work hard and push forward. From the Acting President's perspective, it is encouraging to see the teamwork, ideas, and renewed energy across campus that is allowing us to move forward but more importantly, to move forward together. Over the last four months, the teamwork atmosphere is something I have promoted.

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I believe this institution has lost her way over the past few years. Limestone has lost the values that made her special; the values that were influenced by her Christian faith. These are values that I hold dear, those of "Compassion" and "Service". These are the values I felt and experienced when I attended this special institution. As President, I promise to bring these values back and they will be integrated in everything we do.

Limestone's foundation has been cracked and is in great need of repair. I have been working hard to repair the cracks since I returned in March, but I have worked even more aggressively over the last four months as Acting President. I have been working with faculty, staff, board of trustee members, community members, consultants, students, parents, and other stakeholders to help identify the University's problems and to find solutions.

The problems at Limestone and the solutions to these problems are not unique. They are normal industry problems that most of the time require a commonsense approach. The solutions are not difficult to identify, yet you must still have a leader who is willing to work and most importantly listen to all stakeholders to develop and implement the solutions. You must have a leader who will make sure the solutions are fully implemented and will hold individuals and departments accountable. Limestone University needs a leader who will act in the best interest of the University and not what is best for themselves or any one individual. Limestone needs a leader that is not concerned about making a name for themselves but a name for Limestone.

As President, if there is an individual who does not want the best for Limestone, changes will be made. As Acting President, I have already done that. I have made the tough decisions and had many tough conversations. I have made decisions that were not easy from a personal standpoint but decisions that were best for the University.

For a University to survive, be stable, flourish, and be considered successful she must establish her culture and who she is. It is then the President's job to continuously communicate that to the campus and all stakeholders. It is also the President's job to make sure the University is moving down the same path with the same understanding, mission, and vision.

As Acting President, I have already started many of the initiatives mentioned above. I have made personnel decisions that align the right people in the right positions in order to make the right decisions for the University. I have listed these accomplishments on the pages following this letter.

Limestone University must stabilize and to do so she needs to increase enrollment in all three areas, lower expenses by becoming efficient in spending, have a higher focus on fundraising, and make the appropriate changes based off an evaluation of all departments across campus. This will not only help stabilize Limestone, but it will allow her to grow to a higher level, the level that she is meant to be on.

As President I would continue to establish a system in which everyone feels that their voice is heard in the President's Office. I want to be sure concerns from the faculty and staff are discussed in the staff council and faculty meetings and then worked out with the President's Office. I will work to

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prioritize problems that affect the students the most and continue my focus to put students first. We must enrich the student experience. The students must feel that they belong at Limestone University, not just to a sport or to a club.

How to finally repair the foundation:

To permanently repair the foundation, Limestone needs to have a President who is faith-driven and focused on being a leader of the University and not someone who is after accolades and accomplishments for themselves. Limestone needs a leader who listens to the experts around campus and uses their knowledge to formulate a plan and work with the campus to implement that plan. Limestone needs a leader that keeps faith at the forefront of Limestone's vision and mission. Limestone needs a leader who will hold people accountable and put students first. Limestone needs a leader that will not only understand the mission and purpose of Limestone but will also look at academic and athletic programs as a business and maintain that balance. Limestone needs a leader who will work with the Provost and faculty members to identify new programs, concentrations, and majors at Limestone and look to improve the offerings that we currently provide. In addition, Limestone needs a leader who will keep a student first mentality and work with students to identify student problems and the best solutions for them. Limestone needs a leader that will not only serve the students but establish a culture of servitude to the students.

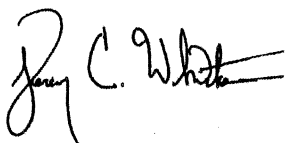
I am that leader.

Closing

Limestone has been a staple institution for all of Cherokee County and the State of South Carolina for the last 178 years. She has the potential to be one of the finest faith-based institutions in the nation. Limestone University is a one-of-a-kind institution. It is life-changing to so many, just as it was for me. Students need to be pushed both academically and personally and they need to be encouraged and supported every step of the way. That was the Limestone I experienced. That is the Limestone I will work each day to re-establish.

Again, I am humbled and thankful for the opportunity to apply for President of Limestone University. There is a debt to Limestone that I will never be able to repay. I would be honored to serve as President with the goal to change the lives of our students in the same way it changed mine.

Sincerely,



Jeremy C. Whitaker

ACCOMPLISHMENTS:

- Uncovered Limestone's true financial situation and the associated problems.
- Led the development of the financial recovery plan and its associated action plans. This not only involved financial planning but strategic planning for every aspect of campus.
- Successfully developed and implemented a recovery and action plan that convinced the auditors to not assign Limestone University a "Going Concern" opinion for both FY2022 and FY2023. Not receiving the "Going Concern" opinion was a necessary step in order for Limestone to have an opportunity to recover financially.
- Provided support, guidance, and freedom for many areas across campus to work together and help correct some of the major, but easily correctable, problems around campus.
- Reduced the overall budget deficit by \$4M for FY2024. This included both a reduction of expenses and the establishment of new and reasonable enrollment revenue goals based on different initiatives.
- Restructured the Information Technology Department (IT). This has allowed better leadership in the department and has allowed for better IT support around campus for faculty, staff, and students.
- Strategically and successfully recruited top talent to improve Jenzabar data, which will provide better financial and student records to generate accurate reports in order to make the best decisions. This will ensure we provide better service for our amazing students.
- Restructured the Student Success Department. This has allowed better relationships between Student Success and other departments around campus that will, in turn, allow Limestone University to better serve all students moving forward.
- Restructured the Enrollment Department (traditional day students.) This has allowed the departments on campus to work closer with our enrollment office and implement changes that should increase enrollment.
- Restructured the Online and Graduate Departments. This has allowed Limestone to better solve the problems with the online and graduate programs ranging from recruitment and advising to quality control of online classroom. This should provide an increase in enrollment in both new students and retention of current students.

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- Shifted the decision-making mind set away from ease of the University and her employees to what is best for the students. This has helped establish a student focus mind set in decisions being made across campus.
- Worked with multiple areas across campus to repair the relationships between the different departments.
- Moved Marching Band from the supervision of Academics to Athletics. The model of reporting to the Vice President of Intercollegiate Athletics has provided growth to our peer institutions in the South Atlantic Conference and should enable growth in the Athletic Marching Band to the level we need for helping to stabilize our on-campus enrollment.
- Helped rebuild trust with the community, new partners, the Board of Trustees, and many other stakeholders that will be very influential to the successful future of Limestone.
- Worked with the South Carolina Attorney General's Office to allow us flexibility with our endowment dollars until the University is back on better financial ground.
- Worked with the Acting Provost to establish guidelines and expectations for our classroom experience in both the on-campus and online platforms.
- Worked with the Acting Provost to revert the overload hour's policy back to two classes versus one class. This will allow better control of the quality of faculty teaching the additional sections.
- Worked with Financial Aid, Institutional Research, Admissions, and Athletics to establish a Financial Aid Matrix that will allow focus on non-student athlete recruitment and a specific initiative to focus on local students.
- Made strategic hires that will move the University forward in multiple areas across campus. These include academic affairs, finance, information technology, campus safety, student success, advancement, enrollment management, and online and graduate programs.
- Worked with a group of trustees and stakeholders on fundraising initiatives. Met with donors on and off campus as well as telephone calls, emails, and teams' meetings. Provided and wrote the financial portions for various grants. Hired an experienced fundraising professional for the Vice President of Institutional Advancement position (to start in January 2024.)

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- Converted Campus Police back to Campus Safety. This has allowed the officers to be able to concentrate more on the campus. I worked with them to fully staff the department, which is the first time in roughly 10 years.
- Worked with the Vice President of Intercollegiate Athletics and the Assistant Athletic Director for Sports Health/Head Athletic Trainer to develop a recruiting plan for athletic trainers which has resulted in Limestone potentially having a full staff of Athletic Trainers in July. This makes Limestone only the second SAC school to potentially be fully staffed with Athletic Trainers.
- Worked to rebuild our relationship with the South Atlantic Conference.
- Led the effort to re-establish our mission, vision, and ethics. This effort will allow the mission, vision, and ethics of our University to be established through the Board of Trustees. This will prevent any one person from making changes to who Limestone University is.
- Worked with the Facilities Manager to understand all of our deferred maintenance and start the process of repairing our dorms. This has allowed the development and implementation of a plan to address the moisture and mildew issues in Brown Hall and is on target to be completed in spring of 2024.
- Established a relationship and built trust and confidence with Brailsford and Dunleavy. Brailsford and Dunleavy is a nationally renowned strategic planning company that is currently being used by Limestone University.

PHILOSOPHY

Higher education has the ability to transform and enhance the lives of individuals and to shape the trajectory of not only their lives, but also their families and their communities. A bold and unapologetic leader is required to continue advancing the core missions of a university while navigating increasingly complex challenges. There are three critical components that are necessary to move an institution forward:

1. A deep and unwavering conviction for the institution, its mission, and its core values.
2. A relentless dedication to students and to advancing the institutional vision.
3. The ability to construct high-performing teams that can effectively carry out the priorities of the institution.

DEGREES/CERTIFICATIONS

- Master of Accountancy, May 2010
Gardner-Webb University, Boiling Springs, NC
- Bachelor of Science – Accounting, May 2008
Limestone College, Gaffney, SC
- Data Analytics Certificate (eCornell), April 2020
Cornell University, Ithaca, NY
- Certified Public Accountant, January 2013
SC Board of Accountancy, #8661
- Certified Fraud Examiner, October 2011
Association of Fraud Examiners, #584494
- Certified Internal Control Auditor, June 2012
Institute of Internal Controls

CURRENT AND PAST POSITIONS

Limestone University – Gaffney, SC

March 2023 – Present

Acting President – (September 2023 – Present)

- Responsible for providing vision and continuous leadership for the University.
- Responsible for providing direction and leadership to ensure the University effectively achieves its mission and goals.
- Responsible for continuously developing the University recovery, stability, and growth plan.
- Responsible for implementing the recovery, stability, and growth plan.
- Responsible for rebuilding trust and relationships with multiple stakeholders.

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- Responsible for representing the University in the community and developing appropriate partnerships and relationships that advance the University's mission and vision.
- Responsible for the leadership of the University and motivating and leading not only the senior administrators but all University employees.

Vice President of Finance and Administrations (March 2023 – Present) (AVP title March 2023 – June 2023)

- Brought in as AVP due to a contractual obligation with an Interim VP of Finance.
- Brought in as AVP with VP of Finance and Administration responsibilities.
- Responsible for the finance operations of the University.
- Responsible for the discovery and analysis of the financial situation of the University.
- Responsible for the development of the financial recovery plan of the University.
- Responsible for multiple departments; Finance/Business Office, Financial Aid, (Information Technology from March until July), Campus Store, Mail Room, Maintenance and Grounds, Campus Safety, Residence Halls, and Nursing.
- Responsible for developing and implementing strategic plans for long term success of the University.
- Responsible for compliance with audits and federal and state agencies.
- Responsible for analyzing financial data and recommending strategic financial plans.
- The primary contact to the Board of Trustees' Finance, Investment, Buildings and Grounds, and Audit Committees.

Winthrop University – Rock Hill, SC

March 2021 – March 2023

Associate Vice President of Finance & Business

- Managed a staff of 7 direct reports and over 20 indirect reports.
- Planned, directed, administered, and organized the financial operations of Winthrop University, which included the offices of Budget, Controller, Payroll Services, Contracts and Grants Accounting, Student Financial Services, Procurement Services, and Internal Audit.
- Served as a key contact for the Committee on Finance of the Board of Trustees and as the University's liaison to the Office of State Budget and primary contact for the South Carolina Commission on Higher Education Finance Division.
- Provided leadership and strategic vision to the Finance and Budget area. Fostered a culture of customer service and high standards of care.
- Prepared the University's annual operating budget (\$170M) by providing strategic analysis and counsel on all aspects of the University's business operations and supporting multi-year business planning.
- Advised on the impact of long range financial and organizational planning and oversee the development of long-range operating and capital plans.
- Evaluated, recommended, and implemented cost saving measures in all areas of the University.
- Oversaw the preparation of annual financial reports by working with internal and external auditors to ensure compliance with financial reporting standards, policies, and procedures.

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- Identified and implemented continuous process improvement initiatives in a collaborative manner to increase the efficiency/effectiveness of the University operations and business processes.
- Submitted fiscal reports to external parties and various other financial reports required by the Commission on Higher Education, as well as those required by general provisions and special provisos of the annual South Carolina Appropriations Bill.
- Designed, implemented, and evaluated the effectiveness of the University's internal controls to ensure that they provided reasonable assurance that operations are effective and efficient, assets are safeguarded, financial information is reliable and compliant with applicable laws and regulations, and they follow policies and procedures.
- Developed, reviewed, and revised financial policies as needed.
- Provided stewardship of resources by applying strong ethical business principles.

Limestone College/University – Gaffney, SC

September 2017 – March 2021

Director of Finance – (April 2019 - March 2021)

- Managed and supervised 10 direct reports with 1 indirect report.
- Managed the financial operation of the College, including but not limited to financial planning, budgeting, financial statement preparation, monthly financial reports, and all other accounting operations.
- Developed and implemented strategic plans for long-term success of the College along with the Executive Vice President of Finance and Administration and President.
- Managed and supervised a comprehensive set of controls and budgets designed to mitigate risk, enhance the accuracy of the College's reported financial results, and ensure that reported results comply with generally accepted accounting principles (GAAP).
- Verified compliance with audits and provided information to external auditors.
- Reviewed, managed, and supervised the cash management process and controls, including student financial aid, payments, and refunds.
- Collected, analyzed, and consolidated financial data, and recommended strategic financial plans.
- Developed, implemented, and continued monitoring and process improvement of the College's procurement system.
- Managed the Business Office (accounting, budgeting, procurement, student accounts, accounts receivable, payroll, financial reporting, accounts payable, and the general ledger) and the oversight of operations of the campus store.
- Served as the liaison between finance and student housing, dining services, admissions, financial aid, student services, registrar, extended campus, information technology, faculty, and to develop, coordinate, implement, and manage process procedures.
- Worked closely with executives (including but not limited to, the President, the Provost, and Vice Presidents, Directors, and Deans of multiple departments) to create and implement College policy.
- Served as the primary contact to the Board of Trustees' Finance, Investment, Buildings and Grounds, and Audit Committees.
- Developed and presented monthly reporting packages to both senior leadership and the sub-committees of the board of trustees.

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- Managed the financial reporting of the athletic department and all NCAA financial compliances.
- Managed the application and management of governmental grants.
- Developed efficient business relationships by negotiating business related contracts including but not limited to procurement, utilities, and insurance.
- Provided supervision of the financial management and administration of construction projects including but not limited to the Request for Qualifications (RFQ) and Request for Proposal (RFP).

Interim Vice President of Finance and Administration/CFO & Controller – (October 2018 - April 2019)

- Continued the responsibilities of the Controller.
- Managed and supervised 14 direct reports with 30+ indirect reports.
- Managed the accounting operation of the College.
- Developed and distributed the production of periodic financial reports and the accounting records of the College.
- Prepared and revised the budget which included a cut of \$2.7 million of gross revenue.
- Developed and presented monthly reporting packages to both senior leadership and the subcommittees of the Board of Trustees.
- Developed, along with the President, strategic plans for long-term success of the College.
- Managed the application and management of Governmental Grants.
- Developed efficient business relationships by negotiating business related contracts including but not limited to procurement, utilities, and insurance.
- Provided supervision of the financial management and administration of construction projects including but not limited to the Request for Qualifications (RFQ) and Request for Proposal (RFP).
- Managed the Business Office (accounting, budgeting, procurement, student accounts, accounts receivable, payroll, financial reporting, accounts payable, and the general ledger) and the oversight of operations of the campus store.
- Oversaw physical plant, including buildings and grounds and planning of future projects.
- Coordinated and managed the College's investments, along with the Investment Sub-Committee.
- Responsible for the management of health and liability insurance.
- As a member of President's Cabinet, I worked closely with other executives (including but not limited to, the President, Provost, Vice Presidents, Directors, and Deans of multiple departments) to create and implement College policy.
- Served as the primary contact to the Board of Trustees' Finance, Investment, Buildings and Grounds, and Audit Committees.
- Developed and directed a new collection process for accounts receivable, which resulted in an increase of 220% on accounts that were written off in the last year.
- Managed multiple items that are outside the normal annual job duties, including but not limited to:
 - SACSCOC Accreditation (writing and interviews)
 - In 2019 following the SACSCOC's 41 write-ups, I provided information, wrote the responses, and attended the interviews with the accreditation committee that cleared Limestone's financial portion of the ten-year review. (I did not write nor had input on the original document that contained the write-ups.)
 - USDA Loan Application

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- Took over a rocky application/review process and worked with the state and federal USDA to get back in compliance to continue and eventually received the approval for the USDA loan that restructured our debt and allowed us to build the new library/student center at an interest rate of 2.125%.
- Transformed a hostile work environment within the Business Office and between the Business Office and other departments without terminating any employees.
- Transformed the perception of the Business Office from a negative stereotype to a positive one that engages clients.
- Implemented a new Procurement and Travel policy.
- Involved in multiple capital projects ranging from a \$30K deferred maintenance project to a 4.1-million-dollar Athletic Facilities project.
- Involved in the planning, design, and securing funding for a 65,000 square foot, 20+ million-dollar Library/Student Center.
- Developed and implemented the grant policy for the College.

Adjunct Professor – (July 2018 - April 2021)

- ID150 Day Class
- Taught Various Accounting Courses Online including but not limited to:
 - Income Tax, Managerial Accounting, and Financial Accounting

Business Office Controller – (September 2017 - October 2018)

- Managed and supervised 9 direct reports.
- Managed the accounting operation of the College (in collaboration with the CFO.)
- Produced periodic financial reports and the accounting records of the College.
- Developed strategic plans for long-term success of the College along with the CFO and President.
- Managed and supervised a comprehensive set of controls and budgets designed to mitigate risk, enhance the accuracy of the College's reported financial results, and ensure that reported results comply with generally accepted accounting principles (GAAP).
- Verified compliance with audits and providing information with external auditors.
- Assisted the CFO in the preparation of the budget by establishing schedules.
- Reviewed, managed, and supervised the cash management process and controls, including student financial aid, payments, and refunds.
- Collected, analyzed, and consolidated financial data, and recommended strategic financial plans.
- Provided administration of the Business Office (accounting, procurement, student accounts, accounts receivable, payroll, financial reporting, accounts payable, and the general ledger.)
- Worked with all departments of the College, including but not limited to, admissions, financial aid, student services, registrar, extended campus, information technology, and faculty to develop, coordinate, implement, and manage process procedures.
- Worked with all levels of the administration, including but not limited to, the President, the Provost, and Vice Presidents, Directors, and Deans of multiple departments.
- Developed and presented monthly reporting packages to both senior leadership and the sub-committees of the board of trustees, along with the CFO.

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- Managed the financial reporting of the athletic department and all NCAA financial compliances.

Milliken & Company – Spartanburg, SC

April 2013 – September 2017

Corporate Accounting Supervisor – Governance, Risk & Compliance (GRC) (April 2013-September 2017)

- Received one of the Milliken Employee Impact Awards that was awarded in the initial creation of the award program.
- Managed and supervised thousands of employees' financial and manufacturing access while evaluating data sensitivity and segregation of duties.
- Developed and maintained Governance, Risk, and Compliance (GRC) policies around user access to various systems including but not limited to the financial system, additional data programs, etc.
- Developed and maintained internal controls of all financially related environments (GRC SAP).
- Tested and evaluated existing internal controls for all financially related environments including COSO and Sarbanes Oxley (SOX) 404 compliance.
- Tested and evaluated the Accounting Information System (SAP).
- Developed and maintained internal SharePoint sight, including site building, access management, workflows, and audit documentation record reporting.
- Developed an understanding of all financial and non-financial areas of a manufacturing business, including but not limited to General Ledger, Procure to Pay, Order to Cash, Inventory, Material Production, Material Quality, and Material Shipping.

Cline Brandt Kochenower & Co. – Gaffney, SC

January 2008 - April 2013

Senior Accountant (January 2010-April 2013)

- Managed and supervised the Audit Team which included training of new employees.
- Communicated with clients including verbal and written communications.
- Performed financial statements and compliance audits, single audits, reviews, compilation, and agreed upon procedures for clients in various industries including colleges and universities.
- Received Advanced Information Technology Audit Training.
- Gained an understanding of GAAP in order to research and interpret standards, regulations, and laws.
- Worked closely with partners to identify ways to make processes, procedures, and training more efficient, productive, and profitable.

Staff Accountant (January 2008 - January 2010)

- Performed financial statement and compliance audits, agreed upon procedures, bookkeeping, risk assessment, internal control analysis, and taxes.
- Assisted and performed reconciliations on different types of accounts, items, and transactions.
- Perform duties and fulfilled responsibilities as part of a team and on an individual basis.