

# Kristy Rogers

## Senior Accountant

Philadelphia, PA 19146

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## Professional Summary

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- 10 years of accomplished experience in the field of accounting.
- 15 years of QuickBooks experience and became a QuickBooks ProAdvisor.
- 10 years of insurance sales, specializing in life and health.
- Awarded Presidents Club and Leaders Conference every year because of phenomenal production and retention.
- Managed complex tasks efficiently and great ability to multitask.
- Changed inefficient work processes into productive ones and introduced automation through software.
- Exceptionally fast, efficient and organized.
- Knowledge of all accounting functions: GL, PL and BS - reconciliations, work papers, cost, cash control, AP, AR and PR.
- Excellent knowledge of tax accounting.
- Highly intelligent, very quick learner who does not need to be micromanaged.

Authorized to work in the US for any employer

## Work Experience

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### Senior Accountant/Controller

Panther East / Black Cat Fasteners-Philadelphia, PA

April 2025 to Present

- Manage all aspects of financial reporting, including preparation of monthly financial statements
- Oversee accounts payable and receivable functions, ensuring timely processing of invoices and collections
- Ensure compliance with all applicable accounting standards, regulations, and tax laws
- Lead the month-end close process, including reconciliations, journal entries, and financial statement preparation
- Developed and maintained internal controls to safeguard company assets and prevent fraud
- Manage accounts payable function, overseeing accurate processing of invoices and timely payments to vendors.
- Manage accounts receivable ensuring timely payments from customers and processing of invoices.
- Ensured compliance with tax regulations by preparing accurate sales tax returns on a quarterly basis
- Provided guidance to Accounts Receivable and Accounts Payable on complex accounting transactions and technical issues.

### Head Server/Bartender

Prime Fusion Lounge-Philadelphia, PA

March 2024 to Present

- Managed a team of 10 servers, providing guidance and support to ensure exceptional customer service

- Implemented new training program for servers, resulting in improved product knowledge and upselling techniques
- Collaborated with kitchen staff to ensure timely delivery of food orders and maintain high levels of customer satisfaction
- Developed and maintained relationships with regular customers, resulting in increased repeat business.
- Resolved customer complaints promptly and effectively, ensuring a positive dining experience for all patrons
- Mentored new servers on best practices for delivering excellent service while maintaining efficiency during busy shifts
- Assisted in the creation and execution of special events, including menu planning, staffing coordination, and setup
- Cultivated a positive work environment through effective communication, teamwork, and recognition programs
- Increased overall sales revenue through suggestive selling techniques and promoting daily specials to customers
- Served as a liaison between front-of-house staff and management team to address any operational issues or concerns
- Trained staff on proper handling of cash transactions to minimize errors or discrepancies at end-of-shift reconciliation process
- Leveraged knowledge of wine pairings to make recommendations that enhanced the dining experience for guests
- Spearheaded efforts to improve table turnover rate during peak hours through efficient seating arrangements
- Demonstrated expertise in handling difficult situations with unruly patrons while maintaining professionalism
- Implemented a feedback system to gather customer opinions and suggestions, resulting in improved service quality
- Maintained a clean and organized work area, adhering to health and safety regulations at all times

## **Brand Ambassador**

Various-Atlantic City, NJ

May 2020 to April 2025

- Promoted to Team Lead on my second day due to having a great work ethic, being reliable and a go getter.
- Responsible for representing brands and products in community, retail, and marketing events.
- Became a brand expert, able to answer questions about product benefits and provide product knowledge.
- Build brand awareness and loyalty by creating memorable patient/customer experiences.
- Manage the distribution/inventory of marketing swag and collateral for events and giveaways.
- Establish and maintain relationships with local community partners.
- Manage and adhere to established schedules in a fast-paced, deadline-driven environment, while ensuring accuracy and follow through.
- Works productively with internal cross-functional teams as well as with external partners.
- Motivated to drive their business day to day and achieve daily, weekly, monthly sales goals.
- Proactively drives business through focusing on the customer at the core of all decisions
- Supports company initiatives
- Participates in team training to execute business results
- Represents the customer experience expectations in store and provide phenomenal customer service
- Supports a collaborative environment with the customer at its core.
- Engages in networking to start to build a clientele.
- Provides ongoing feedback to Management on successes and opportunities.
- Broaden customer accessibility to product discovery - QR codes, digital catalogs, virtual stores.

- Provides necessary feedback to Management on category opportunities or needs.
- Ensures sales floor and all store standards are met at all time.
- Ability to build and maintain positive working relationships with customers, management and co-workers.

### **Senior Accountant**

Robert Polt CPA and Associates-Northfield, NJ

2023 to 2024

- Preparation of tax returns - 1040, 1065, 1120, 1120-S and 990's.
- Responsible for monthly and annual reconciliations including preparation of Balance Sheet, Income statement and Trial Balance.
- Implemented policies and procedures that increases efficiency, lowered company cost and increased revenue.
- Responsible for analysis of all accounts including making journal entries to reconcile all accounts.
- Trained Office Manager in QuickBooks and how to prepare payroll and sales tax preparation.
- Prepared budgets and forecasts for various clients and calculated quarterly estimated taxes.

### **Senior Accountant/Assistant Controller**

Jack J Pryzmont, CPA-Dix Hills, NY

2018 to 2023

- Prepared over 400 individual and corporate tax returns each tax season.
- Responsible for all monthly and annual reconciliations for various clients in QuickBooks
- Analyzed financial statements and prepared journal entries
- Bookkeeping assistance for clients in QuickBooks
- Helped implement and trained clients on the use of QuickBooks.
- Summarized and analyzed financial data with Pivot tables to summarize financial data, such as revenue, expenses, or inventory levels, by category or period.
- Helped identify trends or patterns in the data and to help facilitate decision-making.
- Increased profitability by bringing new clients and making sure current clients had a great experience and fully explained their financials and tax returns.
- Provided tax projections for clients so they were able to make accurate estimated tax payments.
- Implemented paperless accounting with the use of accounting software.
- Prepared financial statements for various clients in accordance with GAAP.

### **Server/Bartender**

Buckalew's Restaurant & Tavern-Long Beach Island, NJ

2018 to 2022

#### **SEASONAL ONLY**

- Developed great rapport with customers and generated repeat business through a friendly, positive attitude and remembering customers preferred seating, food and beverage orders.
- Provided phenomenal customer service and answered questions, explained menu and recommended menu items.
- Always encouraged customers to order specials, wine and cocktails to increase restaurant profitability.
- Significantly increased guest check averages by always promoting appetizers, specialty items, and wine selections.
- Explained how various menu items were prepared, describing ingredients and cooking methods.

### **Insurance Agent**

Philadelphia American-Remote

2014 to 2018

- Helped clients get affordable health insurance plans and always pivoted to supplemental products.
- Educated clients on all of their options, created proposals and comparison spreadsheets for business owners and offered reviews to clients when needed.
- Provided the best customer service offering extended hours until 10pm every day.
- Spent minimal money on leads or marketing - Over 80% of business came from referrals.
- Finished 10th in the country out of 5,000 agents and qualified for the President Club Contest every year.
- Extremely high retention ratio.
- Closed over 65% of presentations and increased my lead base by providing exceptional customer service and always asking for referrals
- Used independent marketing to increase my client base by aggressively reaching out to qualified clients.
- Nationally recognized as an exceptional closer within the first 30 days of employment.
- Consistently surpassed company quotas every month
- Identified sales opportunities by using social and acted on leads
- Handled all prospective client correspondence, including calls and emails

### **Senior Sales Associate**

US Health Advisors-Columbia, MD  
2012 to 2014

Senior Sales Associate specializing in Health Insurance

US Health Advisors - Columbia, MD

2016 - Present

Excelled in providing affordable health insurance to clients.

Was number #1 in the division multiple times.

Very knowledgeable about health insurance options.

Go above and beyond for my clients by offering evening and weekend hours for appointments and to answer any questions for current clients.

Networked with clients in many industries to gain referrals.

Was able to excel at my position by being extremely accommodating and very outgoing.

Have a very high close ratio.

### **Life and Health Insurance Agent**

State Farm-Hughesville, MD  
2011 to 2012

- Excelled in life and health insurance sales - helped Agency reach #1 in 2013 and 2014.
- Top closer in the division and trained new employees to become top agents.
- Made appointments with new and current clients to pivot to other insurance products.
- Provided outstanding customer service skills and went above and beyond for our clients.
- Handled bookkeeping, responsible for monthly reconciliations, prepared budget and forecasting reports, prepared financial statements and tax returns for the agency.
- Obtained Auto, Fire, Life, Health & Annuity licenses.

### **Senior Accountant**

Murphy & Murphy, CPA, LLC-La Plata, MD  
2010 to 2011

Prepared complicated corporate and partnership tax returns for various clients and oversaw the review of individual tax returns.

- Perform and lead audit engagements on various types of clients.
- Responsible for the preparing compilations, reviews and other attest services.

- Preparation of all financial reports, including Profit and Loss Statement, Balance Sheet and Statement of Cash Flows, as well as the year-end financial reports.
- Responsible for the monthly close as well as maintenance of all accounting ledgers including monthly review of all account reconciliations and journal entries.
- Assisted in the preparation of quarterly and annual payroll reports.

### **Senior Accountant**

Murray, Wamsley & Schrader, CPA LLC-California, MD  
2008 to 2010

Oversaw and managed the timely and accurate preparation of tax returns for all types of clients.

- Responsible for the monthly close as well as maintenance of all accounting ledgers including monthly review of all account reconciliations and journal entries.
- Provided timely explanations of variances between actual results and forecasts/budgets; provide corrective action recommendations to management, where necessary.
- Researched tax questions; offered suggestions for tax planning and studied tax laws for potential tax savings for corporate and individual clients.
- Maintained and built strong relationships while assisting and advising in financial decisions and choices.

### **Accountant**

Blum and Clark Accountancy Group-San Diego, CA  
2005 to 2007

Prepared audits for various clients and ensured all General Ledger accounts were scheduled and reconciled.

- Recommended modifications or changes to clients while ensuring all policies and procedures are followed and analyzed business performance to maximize operations.
- Performed analytical procedures/analyses to detect unusual financial statement relationships.
- Prepared monthly financial statements and reports.
- Prepared individual, partnership, corporate and other types of tax returns.
- Performed other tasks such as bookkeeping support and inventory observation.

### **Head Waitress/Bartender**

EJs Landing Seafood Restaurant-College Park, MD  
August 2000 to May 2004

- Always provided phenomenal customer service in a busy restaurant and made sure customers had a wonderful dining experience which led to regular customers.
- Trained, managed and motivated new servers and made sure they were knowledgeable about all menu items.
- Educated customers on menu items and would always upsell to increase restaurant profitability.
- Able to handle multiple tables during busy times and made sure all customers were happy.
- Always made sure workstations were clean and tables were spotless.
- Knowledge of wine and cocktails and always made sure they were made to the restaurants standards.

## **Education**

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### **B.S in Accounting**

University of Maryland-College Park, MD

## Skills

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- Accounts Receivable
- QuickBooks
- Financial Report Interpretation
- Financial Analysis
- GAAP
- Forecasting
- Financial Modeling
- Presentation skills
- Financial acumen
- Auditing
- Analysis skills
- Event Planning
- Insurance Sales
- Microsoft Word
- Budgeting
- B2B sales
- Office Management
- Tax experience
- Proposal writing
- General ledger accounting
- Sales
- Accounts payable
- Financial statement preparation
- Outside sales
- Bookkeeping
- Account reconciliation
- Payroll
- Conflict management
- Financial analysis
- Organizational skills
- Accounting software
- Journal Entries
- Accounting
- Sage
- Balance sheet reconciliation
- Bank Reconciliation
- Customer service
- Microsoft Dynamics GP

- Research
- Account Reconciliation
- General Ledger Accounting
- Accounts receivable
- Business Analysis
- Financial Report Writing
- Accounts Payable
- Financial report writing
- ERP systems
- Tax Experience
- Financial Statement Preparation
- Tableau

## Links

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<https://www.linkedin.com/in/kristyrogersagent>

## Certifications and Licenses

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### **QuickBooks ProAdvisor**

November 2020 to Present

### **Fundamental Payroll Certification**

### **Certified Bookkeeper**

### **Certified Payroll Professional**

## Additional Information

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### SKILLS

- Strong Verbal Communication
- Advanced computer skills
- Excellent accounting skills
- Great customer service skills
- Phenomenal closer and great negotiation skills

### COMPUTER SKILLS

Mac and Windows OS, Microsoft Word, Excel, Tableau, Access, PowerPoint, ProSystem fx Tax, ProSystem Fixed Asset, Lacerte Tax Program, UltraTax, Creative Solutions Accounting, GoSystem Audit, Engagement Manager, Lawson G/L, QuickBooks, Peachtree, Internet.