



Samantha Wilson

Qualifications Summary

Samantha has spent over a decade working directly under CPAs in their offices providing bookkeeping services and more. She is very knowledgeable when it comes to tax season preparation and has a wealth of experience with clean-up projects such as accounting software conversions, cleaning up existing books and tying out financial statements. She has also provided full charge bookkeeping services to clients in many sectors such as medical and dental, construction manufacturing, legal and cosmetic beauty services.

Core Expertise

Account Reconciliation • B&O Sales & Use Tax Returns • Accounting Software Conversion & Clean-up Process • Financial Statements • Tax Preparation

Professional History

ASP	Consultant	2023 – Current
Martin, Bircher, Thompson, PC	Bookkeeper/Tax Para	2016 – 2019
Garrison and Kelley CPAs, PLLC	Office Manager/Bookkeeper	2008 – 2015
Bennett Home	Purchasing Assistant	2006 – 2007

Accomplishments

- Used AJEs, Classes and accounts to set up QuickBooks in a way that allowed a client to track different revenue streams and related expenses and easily view the information in QuickBooks to weigh the profitability of different areas of their business.
- Created written procedures for processes, research techniques, and report creation.
- Trained new hires on use of QuickBooks Online.
- Created bookkeeping task template to be customized for individual clients and used to ensure accuracy of monthly bookkeeping.
- Created systems to allow client to track details of an employer paid program, including initial deposit to be used for several classes, enrollee eligibility based on participation, and additional services/charges to be invoiced to enrollee.
- Streamlined bookkeeping processes for day-to-day efficiency and more consistent workflow.
- Throughout the year, prepared needed items for tax season to decrease process times during January to April months.

Education / Licenses

- QuickBooks Online Pro-Advisor Certification

Software

QuickBooks Online • QuickBooks Desktop • CCH ProSystems FX • MS Office Suite