

JILL ALSOP WAUGH

EDUCATION

Indiana University of Pennsylvania, Indiana, PA PhD, Business with emphasis in Accounting (academic program completion date Summer 2020)	Present
Robert Morris University, Moon Township, PA Masters in Taxation	2010
Robert Morris University, Moon Township, PA Bachelor's in Science in Business Administration, Accounting Honors: Magna Cum Laude, Sigma Chi honor society	2003
University of South Carolina, Columbia, SC Associate in Science	1985

TEACHING EXPERIENCE

Allegheny College, Meadville, PA **2019-Present**
Adjunct Professor, Accounting

Teach four-credit course in Financial Accounting to undergraduate students. Course includes an online learning component for homework and to test comprehension of the reading for each chapter. Topics covered include business structures, cash and accrual accounting, inventory systems including LIFO/FIFO/Weighted Average, methods of depreciation, gain and loss on sale of assets, fraud and petty cash systems.

Community College of Allegheny County, Pittsburgh, PA **2016 - 2018**
Adjunct Professor, Financial Accounting

Taught four-credit course in Financial Accounting to undergraduate students. Course included an online learning component for homework and to test comprehension of the written book reading for each chapter. Topics covered include business structures, cash and accrual accounting, inventory systems including LIFO/FIFO/Weighted Average, methods of depreciation, gain and loss on sale of assets, fraud and petty cash systems.

RELATED EXPERIENCE

Intuit QuickBooks Pro Advisor **2013 - Present**
Pro Advisor

Provide training for users of QuickBooks including the online and desktop versions as well as Point of Sale software. Training provided online as well as in person to single users and entire accounting departments.

Grater Consulting LLC **2009 - Present**
Owner and President

Perform accounting duties and training for interim controller positions at various small and medium companies and manufacturers. Offer QuickBooks training and support as well as monthly accounting function for companies who need a higher level of experience and knowledge, but on a part-time basis.

Representative Projects and Positions

Interim Chief Financial Officer – Provide oversight of finance department, report financials to CEO, senior leadership and Board of non-profit hospice provider, work with external accountants for 401(k) and regular audit as well as liaison for preparation of Form 990.

Controller and CFO – Provide all accounting and financial reporting functions for online educational service provider. Responsible for payroll, A/P, A/R, bank reconciliation, financial reports to CEO as well as investors and working with external accountants.

Campaign Finance Accountant – Provide all accounting and reporting necessary for two campaign funds for a member of the Pennsylvania House of Representatives. Coordinate with political fundraisers and campaign treasurers and candidate to accurately record and report all contributions and disbursements through multiple web-based political and accounting software.

Payroll – Provide payroll services including direct deposit and payment of monthly/semi-monthly and quarterly tax deposits and returns for three clients.

State and Local Tax Audit Services – Provided sales and use tax audit services to client in Beaver Falls, PA. Client was scheduled for a SUT audit when Controller suddenly departed. Worked with Commonwealth representatives to reschedule audit then gathered all necessary information, invoices, purchase orders, etc. for audit. In the process, reviewed purchase orders and invoices for overpayment of sales and use tax and presented offsets to auditor's findings. Provided workers' compensation and unemployment insurance audit assistances as well to various clients

Interim CFO – Performed forensic accounting services for organic products manufacturer of private label products. Checked all A/P and A/R as well as payroll, bank accounts, wire transfers and internal documentation for audit. Made corrections to QuickBooks accounts to correct errors from prior periods. Maintained position until new controller was hired and then trained and transitioned to the new hire in 2009, second interim period between controllers in 2010, third interim period after sudden death of controller in 2011 through 2012.

Litigation Support – Database management and reporting project involving litigation needs of insurance company. Used Microsoft Access to prepare reports showing billed amounts for a multiple year period for multiple defendants with information extracted from law firm's billing system.

Payroll Tax Specialist – Focused on payroll tax research regarding electronic payments, electronic return filing, etc., assisted with monthly and quarterly reporting, troubleshooting and client maintenance.

Interim Office Manager – Performed all accounting functions for four retail bakery stores including cost of goods sold, inventory tracking, all financial reporting, sales and use tax filings, payroll processing and federal, state and local withholding deposits and returns.

Boyden, Inc.

Director of Finance and Administration

September 2008 – March 2009

Provided full accounting function for senior level recruitment firm including payroll, commission calculations, budgeting and financial reporting, liaison with banks and outside accountants.

Willman & Arnold (now Willman & Silvaggio)

Billing Manager, Controller

August 2006 – September 2008

Full financial responsibility for 25+ lawyer defense firm including billing, accounts receivable, accounts payable, financial reporting, tax compliance, budgeting and forecasting, account reconciliation, collections and all other financial functions of the firm. Supervise staff of 3 accounting/billing personnel. Direct relationship with senior partners and insurance carrier representatives as well as tax, actuarial, 401(k) and bank relationships.

Alpern Rosenthal (now BDO)

Seasonal Tax Accountant

January 2006 – April 2006

Assisted in preparing federal tax returns for individuals, partnerships and corporations as well as multi-state sales and use tax returns. Heavy experience with real estate LPs and individuals with multiple K-1 earnings.

Thorp Reed & Armstrong LLP

Financial Analyst

April 2005 – January 2006

Primary responsibilities include monitoring and analyzing the myriad of financial reports that are generated by the firm's accounting system; the goal being to present them in a way that enables the individual practice group leaders to have a clearer understanding of their group's metrics for the prior month as well as FYTD and compared with prior FY and calendar YTD statistics.

KPMG LLP

January 2001 – January 2004

Tax Associate, State and Local Tax

Areas of experience include tax planning strategies for energy clients and knowledge and experience in research regarding sales and use tax, business privilege tax, income franchise tax and state tax solutions for various manufacturing and other companies in the Mid-Atlantic area. Handled filings of federal and state income tax returns, Pennsylvania corporate personal income tax refund applications, sales and use tax reporting, personal property tax returns and other compliance issues for clients. Performed numerous sales and use tax audits including information gathering for Commonwealth and reverse audit preparation for overpayments to use as offsets.