# Nee Ly, CPA

4718 SGV, Pasadena, CA

(626) 235-1437 or calee1359@gmail.com

**ACCOUNTING & TAX PROFESSIONAL:**

Software: QuickBooks pro advisor, LACERTE, ATX (CCH), Pro series. Great Plains, Payroll system

Degrees: MBA (Finance/Taxation CSUDH), BS (Accountancy CSULB)

Official Licenses: EA (2019), CPA (2022)

Business Analyst certificate (UCI)

**PROFESSIONAL EXPERIENCE**:

**Public Accounting Experience:**

Consulting CPA (employee) LA Present

Accounting/Payroll/Audit/Taxes

Eric Ynn, CPA LA 1/2018-4/2022

**Sr. Tax Accountant**

* Handled Accounting/Payroll & Tax Compliance for multiple clientele
* Reviewed year end books for clients to make adjustments & prepare tax returns
* Tax research & Tax planning based on clients demand
* Conducted interview , verification & inquiries from clients
* Handled Notices from FTB & IRS for clients

Kay Tax & Accounting, EA Irvine, CA 06/2016 –10/2017

**Tax Accountant**

* Handled multiple accounts- full cycle accounting A to Z, payroll, taxes, reporting, income taxes
* Prepared tax returns for C-corp, S-corp, Partnerships, Exempt Org, and individuals
* Used Quick books (pro advisor level), Lacerte, & various tax software
* Conducted interview, write up, and set up new clients in order to do their books, clean up messy books, payroll & taxes 941-940, and prepared tax returns for these clients
* Team leader for multiple projects (accounting & tax)

LAC., CPASan Marino, CA 02/2014 –06/2016

**Senior Accountant**

* Handled clients of bookkeeping, payroll, taxes, quarterly reporting, annual reporting
* Filed tax returns for these clients including C corp, S corp, other pass through, Exempt Org, individuals
* Used Quick books, Lacerte for taxes, 1099s, and QB payroll as well
* Conducted interview clients for accounting set up and taxes info.

Tax research & planning in occasion

**Corporate Accounting Experience**:

SM Medical Clinics Huntington Park, CA 02/2010-01/2014

**Accounting Manager**

* Ensured timely response to doctors and manager questions through the preparation of specialized reports and documents to provide information and explanation of trends and key performance indicators for each clinic.
* Responsible for the preparation and review of month-end and annual accounting close packages for multiple locations.
* Recommended and developed new reports and analysis tools to enhance management of reporting of key performance data for patient/doctor analysis.
* Participated in the review of services provided by third party vendors to determine that fees were reasonable and contract terms were successfully performed by all involved parties.
* Handled A/P, A/R, and payroll for multiple clinic locations.

Attended Full Time MBA program 09/2007-12/2009

Bio touch International, Inc. Walnut, CA 01/2003–09/2007

**Supervisor**

* Prepared monthly close, general ledger accounts reconciliation, journal entries, monthly financial statements including P&L, BS according to GAAP.
* Reduced billing cycle from two weeks to daily invoicing, allowing additional borrowing on line of credit.
* Handled intercompany transactions & eliminating entries for consolidation.
* Provided full support of payroll system conversion to Paychex Preview.
* Provided system and technical accounting considerations, supported controller/CFO in the development of efficiencies through policies and procedures implemented on the Department.

**ACTIVITIES:** Calcpa, CPA Society

CSULB Accounting & Finance/Tax Club

Volunteer Tax Prep for the elderly, community