



Monica Wong

Vice President
Finance Practice

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Monica brings over 20 years of leadership abilities from working with small to mid-sized companies. She's helped businesses follow through on their process improvements, setting up and implementing their internal controls, month-end procedures, and preparing financial statements. She is passionate about helping her clients through difficult times, problem-solving, and providing quality service.

EDUCATION

BA, Accounting
University of Northern Iowa

EXPERIENCE

Finance Operations Manager
Burr Oak Group, Inc

Audit Manager
Barton Walter & Krier, LLC

Manager, Regulatory Reporting
UnitedHealth Group

Accounting & Auditing Senior
Lurie Besikof Lapidus

STRENGTHS

- Patience while training staff
- Commitment to getting the job done accurately
- Problem solver
- Strong Analytical Skills
- The ability to quickly learn a new job & software
- Open communicator

AREAS OF EXPERTISE

Accounting

Extensive experience in preparation of month-end close, creating a financial package, audit preparedness, and training staff on GAAP Accounting.

Budgeting & Forecasting

Creating proper reporting mechanisms to allow clients to effectively manage their cash flows.

Process Improvement

Always on alert identifying and implementing efficiencies that improve the bottom line.

INDUSTRY EXPERIENCE

Healthcare Services in the fields of
Physical Therapy offices,
Psychology Clinics, ENT Clinics,
Drug & Rehab Facilities, and Dental
Clinics

Family Offices / Investment Firms
Financial Services
Manufacturing
Retail



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