

Monica Wong

Vice President

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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.

AREAS OF EXPERTISE

Accounting

Extensive experience in preparation of month end close, creating a financial package, audit preparation, 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

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| 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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EDUCATION

BA, Accounting
University of Northern Iowa

EXPERIENCE

Transitioned new CFO & staff, implemented Accounting Procedures, performed a commission audit
Retail Services Agency

Transitioned new CFO, trained staff, streamlined month end close, created weekly budgets & managed cash flow
Healthcare Services Company

Implemented Quickbooks Online, setup payroll, bill.com, expensify, created Policies & Procedures
Family Office

STRENGTHS

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



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