

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

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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