

# Risa O Ramos

**Date of birth:** 07/08/1981

**Nationality:** Cabo Verde and US Citizens

**Address:** 33 Michelles Path, W Yarmouth 02673, United States

**Phone number:** 5086853553

**Email address:** asiraleunam@gmail.com

**Web:** <https://meritpages.com/Risa-Oliveira-Ramos/4920832>

**Professional Development:** Doctor of Business Administration Student/Candidate for the Uniform CPA Exam

**Personality Style & Type:** DOMINANCE DISC STYLE - Direct & Decisive & ENTJ Personality Type



## Profile

Senior Accountant with more than ten years of experience in financial Accounting analysis and consultancy. *Perform diversified duties in maintaining and providing accurate and timely financial statements for one of Cape Cod's leading Accounting and Tax companies. Assigned to examine financial information to facilitate month, quarter, and annual close. Conducted technical accounting research and led variance analysis and forecasting activities for complex Companies. Established formal account reconciliation processes following requirements for internal controls.* Coordinated end-of-the-

month/quarterly closing procedures in accordance with GAAP. I am looking to bring my general accounting expertise and experience as a charge of setting up numerous small businesses throughout these years. I would be a valuable asset to any company financial department that hires me.

- Drafted policies and procedures to efficiently allocate resources.
- Performed executive administration to ensure deadlines were achieved.
- Prove estimates, manage workload and assign subject matter experts to support teams.
- Client correspondence and network externally to build and leverage relationships.



## Education

10/2019 – 12/2021

MANCHESTER, UNITED STATES

**MS Accounting w/conc in Taxation (MS.ACC.TAX) | Master Degree Southern New Hampshire University**

GPA - 3.93

Member of the National Society of Leadership and Success

Conferral Date -January 1, 2022



## Education

05/2019 MILTON, UNITED STATES

**Bachelor's Degree in Science Business Management Curry College**

- GPA - 3.9...
  - Dean's List for the Fall 2018 semester
  - Dean's List for the Spring 2019 semester.
- <https://curry.meritpages.com/stories/Risa-Ramos-has-been-named-to-the-Spring-2019-Curry-College-Dean-s-List-/14693492>

2016 – 05/2018

WEST BARNSTABLE, UNITED STATES

**Associate in Science in Business Administration Accounting Concentration Cape Cod Community College**

- GPA - 3.8 - GPA - 3.8 High High Honor
- Accenture Scholarship award at Cape Cod Community College
- CCCC Honors Club Scholarship Award at Cape Cod Community College
- Members of Cape Cod Community College Honors Program
- Phi Theta Kappa Honor Society member

2006 MINDELO, CABO VERDE

**Bachelor's degree in Tourism and Hospitality Management Uni-Mindel Cape Verde**

2008

**Associate Degree in Management and Accountancy University of Cape Verde**

10/2021 – PRESENT MINNEAPOLIS, MN, USA

**General Management | DOCTOR OF BUSINESS ADMINISTRATION Capella University**

The DBA, will provide a broad perspective on accounting and technical accounting knowledge will be applied in this specialization, enabling me to

## Education

explore relationships between business activities, economic outcomes, and business performance. Upon completion of this course, I will be able to analyze advanced business management and the organization of assets, liabilities, and operating results of businesses.

## Highlights

- Analytical reasoning
- Financial statement analysis
- Budget analysis
- General ledger accounting aptitude
- Account reconciliation expert
- Effective time management
- Strong organizational and communication
- Excellent managerial techniques
- Flexible team player
- Cash-flow report generation
- Account reconciliations
- Proficient in Microsoft Office
- Thrives under pressure
- Knowledge of Quickbooks, Oracle, Primavera, ProSeries, Ultra Tax, FA, Practice Management, Canopy.
- Worked with auditors on the fiscal-year-end audits of clients.
- Complete accounting records in accordance with current accounting standards.

## Work experience

01/2019 – 08/2021 HYANNIS, UNITED STATES

### **Accounting Team Leader ( Senior Accountant) Crabtree CPA, and Associates**

- Manage accountants, review their work, and ensure all team functions and responsibilities are completed on time.
- Managed accounting operations, accounting close, account reporting, and reconciliations.
- Responsible for handling tax services, accounting, and communications for more than 140 small businesses and their related personal and family members.
- Selection, hiring, and training of accountants
- Creating a plan on how to do internal accounting
- Ensured confidentiality info on clients of pay rates and other business matters.
- Providing training for accounting staff members assigned to the team to assist the accountancy department with questions.
- Reviewing and approving invoices received from the home office.

## Work experience

- Ensure the G/L is accurate by reviewing the accountant's book entries.
- Provide specific answers to accountants' or business owners' questions about general ledger analysis and audit preparation.
- Prepare a valuation of the business.
- Create a personal financial statement for clients

02/2017 – 01/2019 HYANNIS, USA

### **Tax accountant Crabtree CPA and Associates**

- Corporate Accounting/Financial Reporting Services and Communication
- Tax prep
- Financials Analysis
- Set up the new company( legal docs)
- Mentoring/ Training New Accountants
- Personal Financials
- QuickBooks Desktop & Online Training
- Oversaw accounting operations, closing accounts, reporting, and reconciliations.
- Establishing and reviewing cash flow, balance sheet, and income statement for client and firm owner.
- Reviewed nearly 140 small businesses' accounts on a monthly, quarterly, and annual basis.
- Coordinated the addition of fixed assets, loans, and lease accounts.
- Assisted the business owner in purchasing investments
- Prepared year-end financial docs and year-end internal audit to prepare a tax return.
- Prepared journal entries for accruals and prepaid expenses
- Review and correct clients' accounts payable and receivables
- Journalizing payroll transactions
- Prepare and file sales tax returns
- Prepared 1099 forms.
- Contribute to the preparation of a manual of accounting procedures
- Simplified inefficient work procedures through automation.
- Help clients open all new bank accounts/ handle new accounts with online banking.
- Under pressure, investigated discrepancies in monthly bank accounts and resolved them.
- Analyzed and resolved complex, unusual, and non-routine variances
- Providing a report to the owner when problems arise or unusual events occur
- Review all Cash Flows before releasing them

06/2016 – 02/2017 FALMOUTH, UNITED STATES

### **Accounting and Auditor Internship Woods Hole, Martha's Vineyard and Nantucket Steamship Authority**

- Updated the Accounting Department tax database
- Accounts receivable and payable

## Work experience

- Audited tickets
- Bank reconciliations and locations daily sales reconciliation

05/2011 – 2013 NOVA SINTRA, CAPE VERDE

### Tax Accounting and Audit Technician Department of Finance Brava

- Audited small business accounting
- Planned and processed payments
- Collected Tax Payments
- Evaluated financial accounting reports

10/2000 – 11/2004 NOVA SINTRA, CAPE VERDE

### Economics and Geography Teacher Eugenio Tavares, High School

- Created lessons that cover into to Economics and Geography
- Taught students in the classroom
- Administered tests, assessed student progress, and provided grades
- Communicated with parents about students'

01/2018 – PRESENT YARMOUTH PORT, USA

### Tax & Accounting Manager Captain by The Bay LLC

#### Tax Accounting Manager

- Comply with laws and regulations when performing tax services
- Plan, consult, and provide excellent advice to clients
- Develop innovative tax planning strategies
- Compile and review complex tax returns
- Analyze all tax risks
- Ensure tax compliance and provision
- Improve processes using best practices by proposing innovative solutions
- Coordinate and manage tax audits
- Maintain general ledger tax balances
- Maintain regular tax filings and handle all requests for data
- **Utilize Tax Provision software to prepare and review tax accounting calculations according to ASC 740**
- **Prepare technical tax research in support of federal, state, and local tax policies and positions**
- **Prepare Business Tax services for federal, state, and foreign income tax returns, including consolidated and unitary filers**
- **Compile quarterly cash tax payments**
- **Changes in accounting methods, R&D credits, and other tax projects**
- **Examine personal and business tax returns**
- **Researching tax issues**
- **Prepare clients tax planning and help management**
- **Responsible for Accountants and Admin - generalist work**
- **Managed tax and accounting team**

## Work experience

- Led tax and accounting projects
- Implemented new tax and accounting policies
- Trained and developed team members
- Reviewed tax and accounting reports

## Skills -

- # Ability to prioritize
- # Adapting to changing circumstances
- # Attention to detail # Action oriented
- # Consistently meeting deadlines
- # Direct • Decisive • Confidence • Problem Solver
- Risk Taker • Self Starter
- # Great manager of crisis • Self reliant • Focus on goals • Solution and action focused • Willing to speak up • See the big picture • Can handle multiple projects/tasks • Welcome challenges without fear
- # Value to Teams: Places value on time • Challenges the status quo • Innovation
- # Adaptable # Responsible

## Skills/Strengths

### ~ COMPUTER/DATA ANALYTICS SKILLS

365 Microsoft Office	Professional
Quickbooks	Full
CS Professional Suite, plus Microsoft® Office and Exchange.	Full
Accounting CS	
Fixed Assets CS	Professional
UltraTax CS	Professional
Proseries Pro	Full
Envio	Professional

### ~ LANGUAGES

Spanish	Full
English	Full
French	Professional
Portuguse	Native
Cape Verde kriolo	Native

### ~ INTERPERSONAL SKILLS

Accuracy	
Analytical Skills	
Detail Orientation	
Good Team Player	
Multitasking	

## Volunteering

2017 WEST BARNSTABLE,, UNITED STATES  
**Vice – president of Service -Alpha Upsilon Mu Chapter of Phi Theta Kappa Honor Society Officer**  
Cape Cod community College - Phi Theta Kappa Honor Society Officer

2015 – 2018  
WEST BARNSTABLE, UNITED STATES  
**Member of Cape Cod Community College Economics Club**  
Cape Cod Community College

2015 – 2018  
WEST BARNSTABLE, UNITED STATES  
**• Member of Cape Cod Community College Rotary Club**  
Cape Cod Community College

2014 – 2015 HYANNIS, UNITED STATES  
**ESL volunteer Teacher**  
S. Francis - Catholic Church

2001 – 2004  
NOVA SINTRA - BRAVA, CAPE VERDE  
**Youth Event Director**  
Brava City Hall

2001 – 2004 NOVA SINTRA, CABO VERDE  
**24 hours Event Cultural Coordinator**  
Brava City Hall

## Certificates

05/2018  
**Accounting Certificate in Bookkeeping Clerk**  
Cape Cod Community College  
GPA - 3.8 High High Honor

05/2018  
**Accounting Certificate in Computerized Accounting**  
Cape Cod Community College  
GPA - 3.8 High High Honor ( WIP)

2006  
**Spanish Certificate**  
Uni- MIndelo

06/2021  
**Foundations Of Leadership Certificate 1**  
The National Society of Leadership and Success  
<https://members.nsls.org/members/badges/foundation-of-leadership-1/earner/00020c14-9466-49bf-6b31-4ca702d25d11/share>

## Certificates

06/2021  
**FOUNDATIONS OF LEADERSHIP CERTIFICATE 2**  
The National Society of Leadership and Success  
<https://members.nsls.org/members/badges/foundation-of-leadership-2/earner/00020c14-9466-49bf-6b31-4ca702d25d11/share>

## Hobbies



Traveling



Reading,  
Writing  
Cooking,  
Human Rights



Every kind of sport

## Awards & Membership

05/2019  
**Spring 2019 Curry College Dean's List**  
Curry College  
<https://curry.meritpages.com/stories/Risa-Ramos-has-been-named-to-the-Spring-2019-Curry-College-Dean-s-List-/14693492>

12/2018  
**Dean's List for the Fall 2018 semester.**  
Curry College  
<https://curry.meritpages.com/stories/West-Yarmouth-Resident-Named-to-Curry-College-Dean-s-List-/12236286>  
Curry College is proud to announce that Risa Ramos of West Yarmouth MA has been named to the Dean's List for the Fall 2018 semester.

2016  
**Accenture Scholarship award**  
Accenture  
Evening Of Excellence Award

*Accenture Scholarship award at Cape Cod Community College - 2016 and 2017*

**CCCC Honors Club Scholarship Award**  
CCCC Honors Club  
Evening Of Excellence Award

CCCC Honors Club Scholarship Award at Cape Cod Community College - Participate in three CCCC Honor Colloquium



## Awards & Membership

2015

### **Phi Theta Kappa Member Phi Theta Kappa Honor Society**

Member ID 2878786

Proud Phi Theta Kappa Officer - I always have a focus on achieving results in my personal and professional life. I have strategic vision, language skills, undergraduate degrees, international experience, creativity, interpersonal skills, technology domain, and negotiation skills. These skills will enable me to offer any business a competitive advantage in the market.

2019

### **AIPB Member ID: 002743837 American Institute of Professional Bookkeepers**

2021

### **THE NATIONAL SOCIETY OF LEADERSHIP AND SUCCESS NSLS Member**



## Classes on Graduate Level

✓Financial Accounting ✓Managerial Accounting ✓  
Intermediate Accounting I  
✓Microeconomics ✓Cost Accounting ✓Advanced  
Accounting ✓Intermediate Accounting II ✓ Applied  
Statistics ✓Corporate Finance ✓International  
Business ✓Estate and Gift Taxation ✓Managing  
Through Communication ✓Federal Taxation-  
Individuals ✓Federal Income Tax of Corp ✓  
Corporate Financial Management ✓Financial  
Reporting I ✓Situational Ethics Accounting ✓  
Business Law ✓Financial Reporting II ✓Auditing  
✓Financial Reporting III ✓Advanced Topics in  
Financial Reporting ✓Tax Research  
Methodology ✓Control/Audit of Acct Info Sys