

Amy R. Tollefson, C.B.

- Summary** Over fifteen years experience in financial and account management, project accounting, bookkeeping, budgeting, and financial analysis. Excellent in problem solving, customer service, and public speaking abilities. Strong organization, written and verbal communication skills.
- Experience**
- ACCOUNTABLE BOOKKEEPING-San Diego, CA 2003-Present**
Certified Bookkeeper
- Working as an independent contractor, offering bookkeeping and payroll services to small businesses and sole proprietors.
- SICOMMNET - San Diego, CA 2000-2002**
Financial Manager (2002)
- Responsible for general ledger, A/R, A/P, financial statement compilation and analysis, payroll, procurement of supplies, and resolution of billing issues with clients.
 - Responsible for managing stockholder information and statistics.
- Client Support Manager (2000-2002)**
- Presented demos of software to prospective clients.
 - Implementation of software system and training program for new clients.
 - Responsible for ongoing client support and resolution of software issues.
- IBM – Global Services 1997-2000**
Financial Analyst – Target Corporation Project Office
(1999-2000) Minneapolis, MN
- Financial account mgmt. of IBM outsourcing contract with Target Corp.
 - Duties included customer invoicing, project accounting and procurement.
 - Responsible for tracking and reporting on project income and expenses.
 - Established the yearly budget and presented monthly forecasts.
- Account Financial Analyst - Service Delivery Center West**
(1997-1999) Boulder, CO
- Provided financial analysis and support to Account Managers on over ten service contracts, focusing on cost analysis.
 - Duties included cost accounting, monthly forecasts, and yearly budgeting.
- UNIVERSITY OF COLORADO - Boulder, CO 1995-1997**
Financial Assistant, Astrophysics Dept.
- Financial support of 14 grant accounts for research professors.
 - Responsible for establishing and tracking budgets for dept. support fund accounts, approx. \$2.5M.
 - Assisted with computer network including backups, purchase and installation of HW/SW, and application/system support to office staff.

Education

Certified Bookkeeper, American Institute of Professional Bookkeepers (2003)
University of California Extension, San Diego, CA

B.S. Business Administration – emphasis Finance (1997)
University of Colorado, Boulder, CO

London Seminar in International Finance & Business (1996)
Hosted by Univ. of Colo. in London, England

**Continuing
Professional
Education**

AIPB Coursework (2003-2006)

- Mastering The Statement of Cash Flows
- Mastering Payroll I & II
- Mastering Financial Statement Analysis
- Mastering Internal Controls/Fraud Prevention
- Mastering Adjusting Entries
- Mastering Correction of Accounting Errors
- Mastering Depreciation
- Mastering Inventory

Mastering Quickbooks Software - Real World Training Seminars (2001)

**Professional
Affiliations**

American Institute of Professional Bookkeepers (AIPB)
Association for Independent Accounting Professionals (AIAP)