

William Powelson Areas of Expertise

FINANCIAL ACCOUNTING
AUDITING
STAFF MANAGEMENT

GENERAL ACCOUNTING
TAXATION
BUDGETS & FORECASTS

FINANCIAL PLANNING / ANALYSIS
INTERNAL CONTROLS
CASH MANAGEMENT

PROFILE

An accomplished professional offering broad-based experience in Accounting Management, Taxation, Auditing, Third Party Reimbursement for Medicaid and Medicare. A demonstrated hands-on management style in the development and execution of strategic plans and internal controls to provide the highest level of quality control and ensure company growth. Strong planning and organizational skills in coordinating all aspect of each project from inception through completion. Ability to see the big picture and plan appropriate strategies to achieve results. Well disciplined and highly organized with proven ability to successfully manage multiple assignments efficiently under pressure while meeting tight deadline schedules. A strong communicator with effective interpersonal skills to involve individuals in the work process, provide a sense of commitment and contribution to the overall success of team objectives. A sound professional attitude, strong work ethic, and pride in personal performance. Certified Public Accountant - State of Ohio

PROFESSIONAL EXPERIENCE * ACCOMPLISHMENTS

William Powelson, CPA, Columbus, Ohio

Owner

1986-Present

- ÿ Full authority for the daily operation of this firm, development and execution of company strategic plans, key client development, and project administration.
- ÿ Service include: client audits in the following industries -long-term health care, nonprofit organizations, and contractors * general ledger and financial statement maintenance * projections and cash flow statements * budgets * individual and corporate tax compliance * problem resolution * Medicare and Medicaid cost reports for long-term care facilities * operational procedures and internal control review * accounting software analysis and set up * input for investment alternatives and job costs.
- ÿ Interface with clients to determine individual needs, identify and evaluate problems, and provide solutions.
- ÿ Develop, analyze, and interpret financial information; establish accounting and finance policies; and generate reports outlining the organization's financial position in the areas of income, expense, and earnings.
- ÿ Interface with clients to offer insights on the financial and operational condition of their business, and provide effective recommendations and improvements.
- ÿ Recommend software changes to meet the client's specific industry or modifications of standard software to ensure low cost while still meeting the individual needs of the client.
- ÿ Review client's Medicare and Medicaid cost reports to maximize cost reimbursement.
- ÿ Deliver distinctive, high-quality client service that adds value to the client's business.
- ♦ Served as part-time controller for the home office of a long-term care nursing facility with homes in Ohio and Kentucky. Monitored accounting staff of four, oversaw general ledgers and monthly financial statements. Gathered all year-end tax information for five corporate returns and three partnerships, and filed Medicare and Medicaid cost reports. Held annual planning meeting to maximize cost reimbursement and tax planning strategy.
- ♦ Maintained an accounting firm that met all audit peer review standards set by the American Institute of Certified Public Accountants.
- ♦ Consistently increased annual billing and maintained a very stable client base with minimal turnover.

KMG Main Hurdman / Alexander Grant & Company, Columbus, Ohio

Senior Auditor - KMG Main Hurdman

1983-1986

Senior Auditor - Alexander Grant & Company

1980-1983

KMG Main Hurdmand and Alexander Grant & Company merged in 1983.

- ÿ Planned, performed, and managed audits for a diverse client base for this international accounting firm which included: national retail chains, light manufacturing, banking, long-term care, contractors governmental sectors, compliance, pension and profit sharing.
 - ÿ Conducted a timely and thorough review of audit work papers and reports to ensure all significant accounting, auditing, and reporting matters were identified, resolved, and documented in accordance with firm's policies and professional standards.
 - ÿ Generated reports and provided recommendations to improve internal control.
 - ÿ Provided leadership, guidance, and support as Team Leader of staff of two. Evaluated staff performance, and determined any difficulty in interpreting client information or application of proper accounting procedures.
- ◆ **Successfully passed the CPA exam within two years while maintaining full work responsibilities.**

EDUCATION / TRAINING

- ✓ **ACCOUNTING and BUSINESS COURSES** - Ohio State University , Columbus, Ohio
- ✓ **ACCOUNTING and SCIENCE** - Bowling Green State University, Bowling Green, Ohio
- ✓ **MATHEMATICS AND SCIENCE** - Columbia University, New York, New York

- ✓ **B.S. Degree: BIOLOGY** - Wittenberg University, Springfield, Ohio

- ✓ Relevant Courses: **Required 40 hours annual continuing education * Top Ten Accounting Software Products * Preparing Medicare Cost Reports * Audit Requirements of OMB A-133 * PC Networking for CPAs * Understanding Medicare * Fooling the Auditor * Health Care Conference * Federal Tax Update * Preparing Complex Returns * Single Audit**

COMPUTER EXPERIENCE

Lotus SmartSuite * Lotus 123 * Lotus WordPro * Lotus Approach * MS-Excel * MS-Word
Peachtree * QuickBook Pro * Fixed Assets * PPC Electronic Auditor * SBT Asset Manager
Window 95 * DOS * Laplink

PROFESSIONAL ASSOCIATIONS

Ohio Society of Certified Public Accountants
American Institute of Certified Public Accountants