

Kelsie Latsko

Investment Accountant

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☎ (570) 943-3848

📍 1234 Mountain View Rd, Cheyenne, WY 82001

EDUCATION

Bachelor of Science in Finance and Accounting at University of Wyoming, Laramie, WY

Sep 2018 - May 2022

Relevant Coursework: Financial Accounting, Managerial Accounting, Corporate Finance, Financial Statement Analysis, Investments, Cost Accounting, Taxation, Auditing, Financial Risk Management, and Economics.

LINKS

[linkedin.com/in/kelsielatsko](https://www.linkedin.com/in/kelsielatsko)

SKILLS

QuickBooks proficiency

Financial analysis

Risk assessment

Excel mastery

Portfolio management

Tax planning

Bloomberg Terminal

LANGUAGES

English

Bengali

HOBBIES

Collecting rare coins and banknotes

PROFILE

Results-driven Investment Accountant with 1 year of experience providing expert financial analysis and management for investment portfolios. Proficient in applying accounting principles, monitoring investment performance, and ensuring compliance with applicable regulations. Demonstrated ability to effectively communicate with internal and external stakeholders, and contribute to the achievement of financial objectives. Adept at leveraging strong analytical and problem-solving skills to optimize investment strategies and drive business growth.

EMPLOYMENT HISTORY

● Investment Accountant at Covenant Accounting & Tax Services, LLC, WY

Mar 2023 - Present

- Successfully managed a portfolio of over \$50 million, resulting in an average annual return of 12% for clients during a three-year period.
- Streamlined the investment accounting process, reducing errors by 25% and increasing efficiency by 20%, which led to significant time and cost savings for the company.
- Identified and implemented a new investment strategy that generated an additional \$2 million in revenue for the firm within the first year of adoption.

● Junior Investment Accountant at , WY

Aug 2022 - Jan 2023

- Successfully managed a portfolio of over \$5 million in assets, resulting in a 10% increase in revenue for the firm within one year.
- Streamlined financial reporting processes, reducing the time spent on monthly reconciliations by 20% and increasing overall efficiency in the department.
- Identified and implemented cost-saving measures, leading to a 15% reduction in operational expenses and contributing to an overall increase in profitability for the firm.
- Played a key role in the successful acquisition of a new client with assets worth \$2 million, expanding the firm's clientele and boosting revenue growth.

CERTIFICATES

Chartered Financial Analyst (CFA)

Dec 2021

Certified Public Accountant (CPA)

Feb 2020

MEMBERSHIPS

Chartered Institute of Management Accountants (CIMA)

American Institute of Certified Public Accountants (AICPA)