

Siobhan Sagala

Trust Accountant

Profile

Trust Accountant with 1 year of experience in managing and maintaining trust accounts, ensuring compliance with fiduciary regulations and delivering accurate financial reporting. Demonstrated ability in reconciling account transactions, analyzing financial data, and providing exceptional client service. Proficient in trust accounting software and committed to safeguarding assets while adhering to ethical practices. Seeking opportunities to leverage skills and contribute to the success of a reputable organization.

Employment History

Trust Accountant at Citrin Cooperman, MD

May 2023 - Present

- Successfully managed over \$150 million in trust assets for high net-worth clients, ensuring accurate and timely financial reporting, leading to a 99% client satisfaction rate.
- Streamlined the trust accounting process by implementing new software and automation tools, resulting in a 20% increase in efficiency and reducing manual errors by 15%.
- Conducted thorough audits and reviews of trust accounts, identifying and resolving discrepancies that led to the recovery of \$2 million in misallocated funds for clients.

Associate Trust Accountant at SC&H Group, MD

Aug 2022 - Mar 2023

- Successfully managed over \$200 million in trust assets, ensuring accurate and timely processing of transactions, reconciliations, and reporting, which resulted in a 98% client satisfaction rating.
- Streamlined the trust accounting process by implementing new software and automation techniques, reducing manual entry errors by 40% and increasing overall team efficiency by 20%.
- Led a team of 5 junior accountants in preparing and reviewing over 1,000 trust tax returns annually, resulting in a 99.5% on-time filing rate and a 50% reduction in tax-related client inquiries.

Certificates

Certified Trust and Fiduciary Advisor (CTFA)

Oct 2021

Accredited Estate Planner (AEP)

Feb 2020

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📍 1234 Main Street, Baltimore, MD 21201

Education

Bachelor of Science in Accounting and Finance at University of Maryland, College Park, MD

Sep 2017 - May 2022

Relevant Coursework: Financial Accounting, Managerial Accounting, Corporate Finance, Financial Management, Taxation, Auditing, Financial Reporting, Financial Analysis, Cost Accounting, and Investment Analysis.

Links

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

Skills

QuickBooks proficiency

Excel mastery

Reconciliation expertise

Tax preparation

Financial analysis

Budget forecasting

GAAP knowledge

Languages

English

Bengali