

M e g a n Z u m w i n k e l T a y l o r

1484-A Summer Ridge Drive ❖ Kalamazoo, MI 49009 ❖ Cell: (614) 546-8371 ❖ mzumtaylor@gmail.com

Education

Western Michigan University – Haworth College of Business (Kalamazoo, MI) May 2014 - present
Masters of Science in Accountancy; expected, December 2015

- Completing graduate education at WMU

University of Colorado at Denver – Business College (Denver, CO) Aug 2012 – Dec 2013

Masters of Science in Accounting – transferred to Western Michigan University

- Transferred after third semester of program

Waseda University – School of International Liberal Studies (Tokyo, Japan) Sept 2004 – June 2005

- Program Focus: International Liberal Studies

Kalamazoo College (Kalamazoo, MI) Sept 2002 – June 2006

Bachelor of Arts:

- Graduated Cum Laude in June 2006
 - Major – Philosophy / Minor – Japanese
 - Member of Alpha Lambda Delta Honors Society
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Relevant Work Experience

Houser & Associates, PC (Portage, MI) Feb 2014 – April 2014

Seasonal Tax Preparer

Responsibilities:

- Primarily responsible for the preparation of individual and sole proprietor tax returns.
- Contacted clients with preliminary questions in order to provide the most complete draft possible to the CPAs for review.
- Answered phone calls as back-up to office manager.

Accomplishments:

- Processed over two-thirds of the individual and sole proprietor tax returns received during the season.
- Produced very “clean” drafts for the CPAs to review, such that very few changes were necessary before they were approved and finalized.

CollegeInvest (Denver, CO) Jan 2011 – Jan 2014

Accounting Clerk (Oct 2012 – Jan 2014)

Responsibilities:

- Processed distributions and contributions for the two 529 College Savings Plans managed in-house. Both Distributions and Contributions reach close to a million dollars (\$1,000,000) during high-volume periods.
- Managed the accounting side of the Stable Value Plus 529 College Savings Plan, including monthly reconciliation and journal entries.
- Worked closely with CollegeInvest's Operations Team to troubleshoot customer issues as they arose.
- Processed Account Payable invoices weekly.
- Processed lender claims reports for College Assist.
- Worked daily with Banner, CollegeInvest's customer relationship and account management tool.
- Processed cash receipts for College Assist, initially as a back-up for the regular person, and then full-time.

Accomplishments:

- Worked with CollegeInvest's bank to coordinate and implement a new, more secure ACH process.
- When a co-worker went on maternity leave sooner than expected, assumed the majority of her responsibilities, which entailed familiarizing myself very quickly with the Colorado government's accounting system, COFRS.
- In charge of clearly and concisely documenting the current processes during the preparation to overhaul the Customer Management and Accounting system for CollegeInvest.
- Worked closely with CollegeInvest's business analyst to document the flow of business through the accounting and operations departments in preparation for replacing the customer management system.

Financial Education Program Associate (Jan 2011 – Oct 2012)

Responsibilities:

- Managed the social media platforms for the program, including Facebook, Twitter, and the program blog.
- Reported monthly on the growth and progress of our social media efforts.
- Worked closely with the web development team to test the website before implementing changes and updates.
- In charge of inputting website content updates once approved, and performing basic maintenance on the site using a Microsoft .Net content management system.
- Took over event planning and coordinating logistics for “Train the trainer” events.
- Responded to end-user issues and concerns in a timely fashion.
- Excelled at producing first drafts of letters, blog posts, and other documents for my boss to polish, saving her time and effort.

Accomplishments:

- Grew the Facebook and Twitter followings for the Education Cents brand from near 0 to over 600.
- Helped the Education Cents website continue to grow and serve more students and schools.

Jeff K. Ross Financial Services (Kalamazoo, MI)

Aug 2009 – Jan 2010

Executive Assistant

- Receptionist
 - Responsible for greeting clients, answering phones, and scheduling appointments for the advisor.
- Office Manager
 - Responsible for maintaining accurate records, filing documents, and keeping track of deadlines for various documents and applications.

Ginny S. Dell, Investment Advisor Representative (Kalamazoo, MI)

Jul 2009 – Sep 2009

Assistant

- Answered phones, called clients, and managed appointments.
- Filled out paperwork, researched various funds, and prepared documents for meetings.
- Filed documents and managed the organizational system for the advisor.

Relevant Skills and Abilities

Computer:

- Proficient with the Microsoft Office suite of programs; especially skilled with *Word* and *Excel*.
- Have created many *Excel* spreadsheets to serve various personal and professional purposes, including:
 - A budget overview spreadsheet, used by myself and several members of my extended family.
 - A weekly cash flow spreadsheet to make sure my family’s spending stays on track.
 - A monthly reporting spreadsheet with charts and graphs detailing the progress of social media efforts for CollegeInvest’s Education Cents program.
- Familiar with Intuit’s ProSeries tax prep software, Great Plains, SharePoint, and various Customer Relationship Management programs.
- Willing and able to quickly learn new programs as necessary.

Languages: English, German, some Japanese, and basic Spanish.

Business/Interpersonal:

- Excellent written and spoken communication skills.
- Always curious, and willing to ask questions when clarification is necessary.
- Able to multi-task effectively and manage deadlines with minimal oversight or supervision.
- Have a good sense of time management and how to prioritize tasks.
- Customer service, both internal and external, is a primary strength.
- Problem-solver by nature.
- People person, who works well with others.
- Enthusiastic, friendly, reliable and trustworthy.
- Can learn new tasks and programs quickly and well.
- Adept at researching and resolving issues once familiar with a system.