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# Theresa White Todd

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## CERTIFIED PUBLIC ACCOUNTANT CANDIDATE

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### SUMMARY OF QUALIFICATIONS

Experienced, detailed-oriented professional offering over 20+ years of professional experience in all phases of accounting and financial analysis. Solid interpersonal skills with the ability to contribute as a team player and interface with professionals on all levels. Proficient in CCH ProSystem fx Tax and Fixed Asset Software, Wolters Kluwer Client Accounting Premier Suite, Thomas Reuters CheckPoint, ProSeries and ProConnect Tax Software, Asset Keeper, Drake Tax Software, Employee Auto Compensation Analyzer, QuickBooks Pro Accountant and Microsoft Office Suite.

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### EDUCATION & CREDENTIALS

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#### **Masters of Science - Accounting, 2016**

Liberty University, Lynchburg, Virginia

#### **Masters of Business Administration, 2002**

Webster's University, Columbia, South Carolina

#### **Bachelor of Arts – Accounting, 1999**

Columbia College, Columbia, South Carolina

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### PROFESSIONAL EXPERIENCE

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**Dooley & Company, LLC**, Lexington, SC

April 2018 - June 2019

**Staff Accountant (Public Accountant Practice)**

Key Contributions: Worked full-time while preparing for CPA credentialing

- Performed After-the-fact bookkeeping services for clients
- Prepared Federal and state withholding and tax returns
- Prepared monthly, quarterly and annual multi-state sales tax returns
- Communicated with clients concerning business matters
- Prepared Individual, Trust, Estate, Gift, Non-Profit, Partnership and Corporate Federal and state income tax returns

**A Dowl Knight & Company, PC**, Columbia, SC

Dec. 2014 – March 2018

**Lead Staff Accountant (Public Accountant Practice)**

Key Contributions: Worked full-time while completing Masters of Science in Accounting at Liberty University.

Lead Accountant for the firm, while preparing for CPA credentialing.

- Performed After-the-fact bookkeeping services for clients
- Prepared Federal and state withholding and tax returns
- Prepared monthly, quarterly and annual multi-state sales tax returns
- Communicated with clients concerning business matters
- Participated in Non-Publicly Traded Auditing engagement
- Participated in 401(k) and PSP Auditing engagements
- Prepared Individual, Trust, Estate, Gift, Non-Profit, Partnership and Corporate Federal and state income tax returns

**ASEC International**, Lexington, SC

Dec 2012 – Dec 2014

**Financial Controller/HR Manager** (Multi-Billion Dollar Internet Marketing and Graphic Design Firm)

*Key Contributions:* Consolidated accounting activities from three separate locations into one, Transitioned accounting from QuickBooks Online to QuickBooks Premier Edition, Researched and reconciled one year of PayPal transactions, Established AR collection procedures, Documented EOS Methodology for Accounting.

- Performed Full Charge Bookkeeping duties
- Reconciled monthly transfer price document for two international locations
- Prepared departmental/program financial statements
- Prepared monthly consolidated financial statements
- Prepared Consolidated Executive Report for two international divisions and two US based divisions
- Maintained and Prepared annual cash basis reporting for tax return preparation
- Communicated with public accounting firm and offsite contract CFO
- Prepared payroll for a 45-person staff

**Palmetto Promotions, LLC**, Columbia, SC

April 2012 - Dec 2012

**Accountant** (Multi-Million Dollar Advertising Specialty Firm)

*Key Contributions:* Reconciled 6 months of bank statements for two companies and updated accounting software to reflect current tax return reporting. Research and reconciled over 6 months' worth of Account Receivable and Account Payable invoice discrepancies. Reorganized accounting department for internal control.

- Performed Full Charge Bookkeeping duties
- Verified costing on all Salesperson commission package
- Prepared payroll for a 15-person staff
- Prepared Federal and state withholding payments and tax returns
- Prepared multi-state sales tax returns
- Prepared monthly financial statements
- Communicated with public accounting firm
- Supervised two accounting clerks

**Theresa W. Todd, MBA**, Lexington, SC

March 2009 – Dec. 2014

**Principle/Accountant** (Public Bookkeeping/Tax Practice)

*Key Contributions:* Operated sole proprietor firm while working full time, Obtained several small business bookkeeping clients.

- Performed After-the-fact Bookkeeping services for clients
- Prepared Federal and state withholding and tax returns
- Prepared and processed monthly sales tax returns
- Communicated with clients concerning business matters.
- Prepared Federal and state income tax returns for individuals, Partnerships and S Corporations

**O'Connor Design, LLC**, West Columbia, SC

July 2003 – Aug. 2009

**Accountant** (Commercial and Residential Interior Design Firm)

*Key Contributions:* Updated accounting information and cleaned up discrepancies in books to reconcile accounts to agree with tax return. Completed transition for entity from a partnership to LLC. Completed setup of accounting software entries from previous accounting firm.

- Performed Full Charge Bookkeeping duties
- Verified costing on all sales
- Prepared payroll for a 6-person staff
- Prepared Federal and state withholding payments and tax returns; Prepared monthly sales tax returns
- Prepared monthly financial statements and Communicated with public accounting firm

**Corporate Concepts, Inc.,** Columbia, SC  
**Accountant** (Commercial Interior Design Firm)

May 2001 – Feb. 2003

Key Contributions: Researched and obtain insurance packages for employees, Participated in Worker's Compensation audit, Setup job costing system for salesperson packages.

- Performed Full Charge Bookkeeping duties
- Verified costing on all salesperson commission packages
- Prepared payroll for a 15+ person staff
- Prepared Federal and state withholding and tax returns
- Prepared monthly sales tax returns
- Prepared monthly financial statements
- Communicated with public accounting firm.

**Pulliam Morris Decorating,** Columbia, SC  
**Accountant** (Commercial and Residential Interior Design Firm)

May 1999 – May 2001

Key Contributions: Transitioned firm from package accounting software to industry specific software. Reconciled several months of bank statements for two companies and updated accounting software to reflect current tax return reporting.

- Performed Full Charge Bookkeeping Duties
- Verified costing on all Salesperson commission packages
- Prepared payroll for a 15+ person staff
- Prepared Federal and state withholding and tax returns
- Prepared monthly sales tax returns
- Prepared monthly financial statements
- Communicated with public accounting firm.

**Hobbs and Corley, PA,** Columbia, SC  
**Staff Accountant** (Public Accountant Practice)

Aug. 1997 – May 1999

Key Contributions: Worked part-time while completing Bachelor of Arts degree at Columbia College. Responsible for several small business bookkeeping clients including preparation of payroll while attending classes.

- Performed After-the-fact Bookkeeping services for clients
- Prepared Federal and state withholding and tax returns
- Prepared monthly and quarterly sales tax returns
- Prepared monthly financial statements
- Communicated with clients concerning business matters
- Participated in Non-Profit Auditing engagement
- Prepared Federal and state income tax returns

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### PROFESSIONAL MEMBERSHIP

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American Institute of Certified Public Accountants  
SC Association of Certified Public Accountants  
American Accounting Association  
National Association of Tax Professionals

**References available upon request**