

# LEE S. WILSON, CPA

I am a dedicated, resilient, and resourceful professional striving to build and secure client relationships. As an energetic leader, I have the desire and commitment to strive for best in class, and lead through effectively demonstrating the character, experience and discernment necessary to create the trust and influence for providing the best results.

## PROFESSIONAL EXPERIENCE

### **The Bonadio Group** (September 2015 – Present)

#### **Manager**

- Small business advisor consulting in financial statement reviews and compilations, financial statement projections and analysis, mergers and acquisitions, and business and individual tax consulting services.
- Team leader in a financial statement and booking conversion project for specific financial reports provided to venture capitalist with an anticipated project budget of over \$25 million
- Team manager for providing a real estate company key property metrics on properties valued at over \$75 million
- Developed key relationships that resulted in facilitating accounting and tax treatment for a business purchase of \$1.5 million, and further helped develop and facilitate proper accounting policies for the business owners
- Communicate and deliver financial statement deliverables to partners and clients
- Develop presentations for business owners conveying the advantages and disadvantages of specific business practices
- Identify and convey potential practice improvements to increase operational efficiencies
- Execute and manage project workflows to ensure proper U.S. GAAP and accounting standards are achieved
- Facilitate team and client relationships to ensure project objectives are driven to successful completion
- Manage project workflow to meet anticipated budgets, and further assist in the preparation of timely billings
- Key member in recruiting committee to identify superior potential candidates
- Prepare individual and corporate tax returns

### **Mengel, Metzger, Barr & Co. LLP** (October 2008 – September 2015)

#### **Manager**

- Led team of four in governmental labor compliance audits of a Fortune 50 company
- Presented and measured recommended changes resulting in decreased hourly labor recording discrepancies from above 80% to 3%.
- Identified and recommended annual cost savings of \$245 million by implementing improved workflow processes
- Leader of fixed asset audit engagement with a NBV of \$21.2 million. Results led to 98% audit coverage, including identification of \$1.6 million NBV worth of unrecorded assets
- Examined and verified compliance of the Governmental Investment Performance Standards
  - Assets under management valued at over \$4 billion
- Performed surprise examinations to ensure compliance of the Investment Advisors Act of 1940
  - Assets held in custody valued at over \$10 million
- Team member in identifying and interviewing potential candidates
- Diversified in several industries including but not limited to financial institutions, manufacturing, construction and not-for-profit agencies
- Prepared individual, corporate and non-profit tax returns

## PROFESSIONAL ORGANIZATIONS

### **New York State West Youth Soccer Association** (November 2015 – Present)

#### **Treasurer and Executive Committee Member**

- Supervises the executive director and bookkeeper on accounting and financial statement matters
- Responsible for reviewing, updating and developing financial policies of the organization
- Leader in the preparation and development of yearly financial statement budgets for seven divisions within the organization
- Analytically review and report to the Board of Directors on monthly financial operating results, detailing analytical review of monthly operations compared to yearly results and budgets figures

**Rochester Young Professionals (July 2013 – Present)**

**Vice President of Finance**

- Created and implemented financial processes
- Manager of all financial aspects of the organization, including monthly financial statement preparation and review, bank reconciliations, and yearly tax filings
- Developed financial budgets for six divisions and three key organizational events
- Steering Committee Member and leader of the development of the organization
- Team member that planned and coordinated a community campaign event, consulting and coordinating with a high profile private company in Rochester and the organization

**AI Sigl Council Board Member (July 2014 – Present)**

- Membership committee lead, expected to identify and inform potential young professional candidates the opportunities of serving and participating in the AI Sigl community
- Key group member in organizing an event that raised over \$8,500 in one night

**American Institute of Certified Public Accountants**

**Leukemia & Lymphoma Society – 2015 Man & Women of the Year Fundraising Campaign Winner**

- Led a team of four that raised more than \$40,000 in less than three months, a 38% increase from the prior year
- Planned and coordinated two events in less than three months that encompassed corporate sponsorships and had over 100 attendees at each event

**Soaring Capital Soccer Club (October 2008 – February 2013)**

- Board Member – Soaring Capital Indoor Soccer Facility
  - Youngest of 12 Board Member. Created financial model and business plan with expected annual sales of approximately \$450,000
- Coach (October 2008 – February 2013)

**EDUCATION**

**Certified Public Accountant**, New York State, License #112461

**State University of New York at Fredonia**

**Bachelor of Science: Accounting**, May 2008

- Dean's List, SUNYAC All-Academic Team