

M. Joanna Tompkins, B. Mgt. (Honours)

403 837-7758 Calgary, Alberta



Professional Profile

Overview

Current position:	Senior Financial Controller/General Manager.
Prior position:	Accountant Engagement Lead of QuickBooks; Intuit Canada.
Prior position:	Was a Forensic Accountant in the 90s.
Education:	Bachelor of Management Degree (Honours), UofL 2002.

CastleTrain Group Inc. - May 2007 to Current

Senior Financial Controller / General Manager

Expertise:

- Oversight of the accounting department across Canada: finance, day-to-day accounting, month-end/year-end reconciliations, forecasting, strategic planning, job costing, management and data analysis,
- Direct support to the CEO/President with regards to business development activities such as: investments, acquisitions, dispositions, corporate partnerships; etc.,
- Setup and implementation of: QBO (QuickBooks cloud) the number 1 accounting software in the world and ProFile T2 Corporate Tax Return filings,
- Strong organizational and project management skills,
- Internal Controls nationally, Budgeting, Forecasting and Financial Analysis,
- Human Resources: contact between the organization, staff, and government bodies, provide guidance and training to managers, conduct investigations, and inspire employees towards company objectives,
- Product/Services costing & allocations per: Area, Sales Guys and Percent of Sales,
- A/R, A/P, A/JE, Sales and Sales Tax,
- Joint Ventures, Inter-companies (associated corporations),
- Create, coordinate, and evaluate the financing programs and supporting information systems across several associated corporations,
- Establishing and maintaining superior internal controls and safeguards to monitor progress and present financial metrics to Shareholders,
- Ensure Annual Budgets with oversight of: Payroll, T5s, T5018s, T2200 and GST/HST/PST, and EHT,
- Prepare monthly Unaudited Financial Statements | Management discussion & analysis,
- Enhance accuracy of reported financials and ensure reported results comply with GAAP,
- Prep annual working papers, prepare and eFiling (ProFile T2 Corporate Tax Return) Corporate Tax Returns.

Intuit Canada (March 2004 to April 2007) Home of: QuickBooks, QBO cloud and ProFile.

Accountant Engagement Lead of Canada for QuickBooks and Profile T2s.

- Accounting Advisor, end-to-end for QuickBooks, within a multi billion-dollar corporation, Lead projects for professional accountants across Canada,
- Manage internal partners with Business Unit leaders and external relationships with certified accountants across Canada and bookkeepers, to develop and implement marketing efforts,

- Lead matrix for project control systems & define key accountant processes, with inputs from: new product development, brand plans, creative briefs, and overall company objectives.
- Represent Intuit Canada at various accounting conferences and events across Canada, also (online & live webinars); to promote or train on Intuit Canada's accounting products and services,
- Develop QuickBooks resources, white papers, and other sales documentation for accountants,
- Maintain contact with US counterpart to leverage best practices appropriate for the Canadian market,
- Develop and manage execution of accountant communications, such as the Advisor Advantage Private newsletter for QuickBooks, along with our private member newsletter,
- Develop and maintain financial project plans and account infrastructures oversee project task force teams across Canada and ensure integrity of financial matrix,
- Collaborate with cross-team members to determine accountant acquisition and retention strategies and sell-due-to revenues.

Tekair Safety Inc. May 2002 – February 2004

Senior Controller

- Direct support to the CEO/President with regards to business development activities such as: investments, acquisitions, dispositions, corporate partnerships; etc.,
- Independent & consolidated financials, Joint Ventures & Associated Corporations,
- Incorporations, forensic litigation, corporate infrastructures, partnership agreements & internal management,
- Project management, internal control processes, set-up and maintenance of accounting infrastructures, procurement, and Oil & Gas Safety processes,
- Preparation & filing of corporate year-ends, CCA, Expropriation ruling & amendments, Capital gains on dispositions of major assets, Capital dividends & elections, write-offs & recapturing of same.
- Liaison with government departments: GST Audit & Seizure department, and Government Compliance.

University of Lethbridge. (Sept 1998 to May 2002)

- Bachelor of Management Degree.
- Graduated: May 2002 with Honours.

Law Firms Calgary, Alberta. Fleming & Co., Mackimmie Matthews.

Senior Trust Accountant (5 years)

Day-to-day activities. 10-year retro analysis of Trust Accounts.

PROFESSIONAL DEVELOPMENT

UNIVERSITY OF LETHBRIDGE

- Bachelor of Management Degree, with Distinction. Graduated: May 24, 2002.

C.A. SOCIETY: Chartered Accountant's Society of Alberta

Independent Courses taken through the C.A. Society in the 90s:

Financial Management, CE – GAAP, Financial Statement Presentation & Disclosure, Completion of Compilations (Notice to Reader), Corporate Tax Updates, Income Tax Refresher, Working Paper Files, Accounting for Income Tax Purposes.

SOFTWARE PROGRAMS

QuickBooks Cloud, (QBO), QuickBooks Desktop Pro, Premier, Accountant Editions & Enterprise, Sage 300 – Simply, Accpac: Pro, Accountant Edition, MYOB, LawMax, Barrister, Business Vision and MS Office Pro, Citrix Webex (virtual meetings) GoToWebinar, DropBox, T2 Corporate Tax Returns (ProFile), TaxPrep and CanTax.