



Lisa Gard

Qualifications Summary

Lisa has over 10 years of experience with accounting, bookkeeping and operations of both small and large businesses. Her current focus is to serve small businesses and entrepreneurs in a variety of industries. She loves being a collaborator and serving a significant role to help business owners sort through the universe of reporting, tracking, and managing cashflow and paperwork processes in pursuit of business and financial success.

Core Expertise

- Full Cycle Bookkeeping • A/P and Vendor Management • A/R • Sales Tax Reporting • Payroll and Benefits Management • Year-end Tax Preparation • Financial Reports • 1099 and W2 processing
- General Ledger and Account Reconciliation • Forecasting and Budgeting

Professional History

ASP	Consultant	2022 - Current
Immersive Eye	Owner/Bookkeeper	2015 - Current
Wild Heart Partners	Partner/Analyst	2014-2015
Tetra Tech	Operations Manager	2010-2013

Accomplishments

- Organized and completed three years of accounting records to assist with tax reporting problems from the client's previous tax service, accomplished and reviewed in less than three months
- Assisted client with tracking cash flow to enable the expansion of the business, allowing for a second location
- Prepared specialized reports to assist client with tracking accounts payable
- Transitioned clients from QuickBooks Desktop to QuickBooks Online
- Set up workflow procedures with clients to improve efficiencies and reduce time to secure documentation and coding information
- Transitioned and set up clients from one payroll service to another, improving payroll processes
- Integrated apps and reports from separate POS systems to develop sales tax reports, update inventory and audits for end-of-year accounting reviews.

Education / Licenses

- Bachelors in Environmental Studies – The George Washington University

Software

- QuickBooks Online - Certified ProAdvisor • QuickBooks Desktop • ADP • Gusto • Intuit • Patriot • Microsoft 365 • GSuite