

SARAH CHEN

Senior Finance Manager, CPA

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📍 San Francisco, CA

CORE SKILLS

Financial Reporting

GAAP, IFRS, SEC Filings (10-K, 10-Q), Consolidation, Revenue Recognition (ASC 606)

Analysis & Planning

Financial Modeling, Variance Analysis, Budgeting & Forecasting, FP&A, Cash Flow Management

Systems & ERP

SAP S/4HANA, Oracle Hyperion, NetSuite, QuickBooks Online, Workday Financials

Data & Technology

Advanced Excel (VBA, Power Query), Power BI, Tableau, SQL, Alteryx

Risk & Compliance

SOX 404, Internal Controls, COSO Framework, Audit Planning, Regulatory Reporting

CERTIFICATIONS

CPA 2019

American Institute of CPAs

CFA Level II 2021

CFA Institute

FMVA 2020

Corporate Finance Institute

CIA 2018

Institute of Internal Auditors

EDUCATION

MBA, Finance

UC Berkeley, Haas School of Business
2017

BS, Accounting

University of Illinois Urbana-Champaign
2014

Professional Summary

Results-driven CPA with over 9 years of progressive experience in financial analysis, strategic planning, and corporate reporting across Big 4 public accounting and Fortune 500 industry. Proven ability to streamline close cycles, lead cross-functional teams, and deliver actionable insights to C-suite executives. Deep expertise in GAAP/IFRS compliance, financial systems implementation, and process automation.

Professional Experience

Finance Manager

Jan 2022 – Present

Northwind Retail Group

San Francisco, CA

- Lead FP&A for \$120M SaaS business unit; deliver monthly executive board packages and quarterly earnings commentary adopted by the CFO.
- Architected a driver-based forecasting model that reduced budget cycle time by 40% and improved variance accuracy to within $\pm 3\%$.
- Partnered with Engineering and Sales to build a unit-economics dashboard in Power BI, surfacing a 12% margin improvement opportunity in the enterprise segment.
- Managed a team of 4 analysts; mentored 2 who were promoted to Senior within 18 months.

Senior Financial Analyst

Aug 2018 – Dec 2021

Hartwell & Rowe Advisory

Chicago, IL

- Led financial statement audits for 6 Fortune 500 clients in technology and manufacturing, managing teams of 3–7 across multiple engagements.
- Identified and remediated a material weakness in revenue recognition controls at a \$3B manufacturing client, reducing restatement risk.
- Developed an automated workpaper reconciliation tool (Excel VBA + Alteryx) that cut testing hours by roughly 25% and was adopted by the regional audit practice.
- Earned "Exceeds Expectations" ratings in all three annual performance cycles; selected for the firm's Emerging Leaders Program.

Staff Accountant

Jun 2016 – Jul 2018

GlobalTrade LLC

Seattle, WA

- Owned month-end close for accounts receivable and revenue across 4 international subsidiaries, consistently closing within 3 business days.
- Assisted controller with the transition from QuickBooks to NetSuite; mapped chart of accounts and validated migration for \$45M in annual revenue.
- Prepared quarterly VAT/GST filings for UK, EU, and APAC jurisdictions with zero late-filing penalties.