

**Building Your Story**

The focus of course one is to get you to understand what you have accomplished personally and professionally and present it in a clear and concise manner. The goal is to develop your brand identity, possess the verbally advantage and project with confidence! This section will target all of your academic and professional accomplishments and really set you apart from everyone else! We will teach you in this course to professionally build your brand, your story and present it with power and confidence. This is **YOUR PITCH!** **It’s your Autobiography!** You will build confidence because these are your accomplishments and your words, not someone else’s. Confidence is the key to a success.

This document is about working backwards to get to the root of YOUR story!! Write short bullet points of your responsibilities, accomplishments, projects, software used, awards you received, training and management responsibilities, cost saving etc.,

This tool is going to be something you are going to use and edit for the rest of your career. You are going to add to this as you gain experience, internships, employment or accomplishments in your career. This document will be a resource that will assist you when you introduce yourself to people, when networking, in a professional setting, conducting a job search and interviewing.

**NOTE:** **TIME TO** **BRAINSTORM!** The more bullet points the better. You will need to write and to re-read your points to trigger your memory. Sometimes the smallest bullet point triggers other skills and accomplishments. Do not worry about adding bullets the more the merrier!

Next Section: **THE VERBAL ADVANTAGE!**

The next section will focus on **DELIVERY!** Organizing your story in writing is the first task and is KEY to successful verbal delivery! We will cover volume, pitch, rate, pauses, pronunciation, and impact. No matter what situation or audience you address, you will always be able to engage, interest and deliver with confidence! **THE VERBAL ADVANTAGE!**



**College:**

**College Attended: Salem State University**

**Major: Accounting (Received B.S. in Business Administration – Accounting)**

**Major: Dance (Received B.S. in Sports Movement Sciences – Dance)**

**Minor:**

**GPA: 3.88**

**Year Graduated:** **2013**

**Awards Achieved:**

* Graduated with Magna Cum Lade
* The Book Award in Accounting – SSU, 2013
* The Creative Arts Award – SSU, 2013
* The Silver Key Award – SSU, 2013
* The Firm Scholarship – MSCPA, 2013
* Osram Scholarship Recipient - 2012
* Women in Accounting Scholarship Recipient, 2011
* Presidential Arts Scholarship Recipient – 2010-2012
* Dean’s List Fall 2009 – Spring 2013

**Sports Played:**

**Student Government/Associations:**

* Part of the Peer Mentoring Program – 2012 - 2013

**Fraternity/Sorority:**

* Inducted into the Phi Kappa Phi Honor Society - 2012
* Inducted into the International Dean’s List – 2012
* Inducted into Delta Mu Delta Honor Society – 2011
* Inducted into Phi Epsilon Kappa Honor Society - 2011

**Top three references from college**

* Professor David Goodof
* Norbert Tschakert
* Megan McLyman
* Caitlin Corbett
* John Purisky

**Certifcations/Licensures/Accredidations/Memberships:**

* CPA
* Massachusetts Real Estate License
* Member of the American Institute of Certified Public Accountants
* Member of the Massachusetts Society of Certified Public Accountants



**Volunteer**

**Name of Organization: Extreme Community Makeover**

**Title:**

**Dates worked: 5/5/17**

**Report To:**

**Job Responsibilities:**

* Help clean up neighborhoods (pick up trash, cut grass/weeds)
* Repaint garages over graffiti

**Powerful statements that describe your professional achievements**

* Hard working with an unwillingness to give up
* Communicating efficiently to achieve desired and expected results
* Going above and beyond for your team to achieve the same end goal
* Prideful in your work and always seek for the very best from yourself
* If you want something bad enough, you will get it with hard work



**Professional Work or Internship**

**If you just graduated put in your last internship**

**Name of Organization (Current): Benefit Street Partners**

**Title: Senior Associate**

**Dates worked: 11/26/18 – 01/25/19**

**Report To: Nina Baryski (Director - Controller), Glen Xiques (Manager – BSP Finance)**

**Job Responsibilities:** (If there are more than 10 keep writing, the more info the better the story. Include accomplishments, projects, cost savings, processes put in place, system implementation, creation of spreadsheets, etc. These are bullet points and small phrases that trigger more thoughts)

* Responsible for the reconciliation of shadow books to official books and records for one comingled private debt fund:
  1. Management Fee Calculation
  2. Distributable proceeds
  3. Expenses
  4. Income accrual
  5. Position Reconciliation
  6. Due to/from
* Reconcile cash on a daily basis for 7 accounts (2 Prime Brooker, 2 Operating, 1 AIV, 2 SPV)
* Post paydowns, commitment decreases and borrowings in VPM for term loans, revolvers and delayed draws
* Record LOC borrowings
* Prepare the LOC borrowing form for submission to the bank
* Responsible for ensuring cash balances are sufficient for current day settlements on trades
* Post interest income daily in VPM
* Responsible for ensuring contracts are setup correctly in VPM (global amount, interest rate)
* Instruct third party manager to initiate cash transfers
* Responsible for instructing third party consultant to properly book cash transactions
* Review interest expense calculation and true up accruals to payment amounts
* Update OMS with capital transactions for one fund
* Properly settle trades in VPM with settlement date from agent
* Research discrepancies between notices from agent and system contracts
* Ensure season trades are in line with system generated amounts and confirm cash has been transferred for these trades
* Prepare debt compliance on a quarterly basis (2 LOC accounts)
* Review bi-weekly A/P files to ensure expenses are in line and allocations between onshore and offshore are reasonable
* Setup prepaids in VPM
* Update and maintain deferred financing cost schedule and bookings

**Computer Systems Used:**

VPM, OMS (home grown System), Microsoft Office, Skype for Business, VP Recon, Watchdox

**Reference (who would give you a reference to describe your work performance Name & Title)**

**Name of Organization (Current): AEW Capital Management, L.P.**

**Title: Associate**

**Dates worked: 05/22/17 – 11/16/18**

**Report To: Robin McElligott (Controller), Matthew Silvestri (Assistant Controller)**

**Job Responsibilities:** (If there are more than 10 keep writing, the more info the better the story. Include accomplishments, projects, cost savings, processes put in place, system implementation, creation of spreadsheets, etc. These are bullet points and small phrases that trigger more thoughts)

* Responsible for monthly, quarterly and annual accounting on three funds
* Review and assure correctness on 25 property financials on a monthly basis
* Constantly communicate and maintain professional/dependable relationships with third party property managers and property accountants
* Upload 25 trial balances into Yardi
* Make fair market value entries on each property (appreciation/depreciation on property values, write up/write down on debt, write off of depreciation/amortization)
* Make investment level entries and record AEW only entries on the investment level
* Confirm the roll up of the investments into the fund level is accurate
* Compile debt compliance documents on a quarterly basis and remind property accountants/confirm debt compliance is completed on properties that are compiled by the third-party management teams
* Complete monthly checklists that are reviewed by the Assistant Controller
* Work on wholly owned financials, joint venture financials and equity method financials
* Calculate asset management fees for three funds, complete the invoice and compile the pdf to be sent out by the assistant controller when finalized
* Responsible for compiling the distribution calculation for our client on a monthly basis (sent out on the last day of the month every month)
* Review, edit and send out the distribution calculation on cash flowing properties on a monthly basis (sent to asset management and the controller and assistant controller for approval – capital must be approved by asset management, calculation in general must be approved by the controller)
* Make sure distributions are received by month end of the quarter end month so the distributions for the quarter are sent out to the client on a quarterly basis
* Help compile the information/amounts necessary for the distribution notice to the client
* Help determine through analysis how much is needed for a capital call from our client on one fund
* Upload trial balances into Yardi by the 15th of each month after quarter end and run NCREIF reports, commenting on any variances that are over certain thresholds
* Prepare schedules for a third-party debt valuation company for one fund and push through those FMV changes to the debt by the 15th (i.e., if quarter end is 09/30, everything needs to be in by 10/15).
* Roll forward and prepare quarterly schedules for the client quarterly (includes financial support schedules, QIU (investment summaries for each investment), debt and real estate roll forward schedules
* Prepare the financials, run TWR and IRR returns from company home grown software, complete capital call and distribution schedules
* Created a distribution tracker so that it is more efficient and easier to compile the quarterly distribution notice
* Always asked to review the quarterlies for any formatting issues, wording of phrases, and presentation
* Always solving formatting issues that the assistant controller and controller do not know how to fix
* Compile and prepare the RMC presentation book for two funds (Risk Management Committee) - includes preparing supporting schedules, updating verbiage to then be revised/edited by the Portfolio Manager - completed mid-year and at year end
* Annual Budget/Business Plans - prepare the non-op, debt service, and insurance budgets for each property (25 properties)
* Review and provide comments on reforecasts and budgets for 25 properties on 2-3 drafts per property
* Participate on budget calls run by asset management with the third-party property management teams
* Keep asset management accountable for the timeline for the budget and ABP process, making sure we will meet the deadlines
* Responsible for the accurateness of the reforecast and the budget for each property in Asset Eye and confirming what was sent in excel matches the upload
* Guide asset management on certain capitalization rules for capital projects in the budget and the reforecast
* Upload the approved reforecast and budget into Yardi, including making minority interest adjustments and other investment level adjustments
* Input the budget and reforecast into the annual business plan
* Update the year over year information in the annual business plan
* Roll up and complete the fund level budget on one fund
* Be the main point of contact for PWC (Auditors)
* Compile summer requests, interim requests and year end requests for the auditors
* Answer any question the auditors have on provided information
* Prepare additional schedules requested from the auditors
* Participate/facilitate the accounting on acquisitions, dispositions and loan refinances
* Compile the opening entry, journal entry for the above transactions
* Review prorations for acquisitions and dispositions
* Review and tie out the closing statements on the above transactions
* Perform and sign off on all due diligence items for accounting on acquisitions
* Prepare and tie out AEW.com reports (tying out NAVs, returns, property type and region type)
* Prepare and get Controller and Portfolio Management sign offs on the fund level check list and the compliance checklist for three funds.
* Use Microsoft Word, Excel, Outlook, PowerPoint, Publisher
* Prepare wire/check requests for all costs/draws that are funded from the fund level bank accounts
* Record quarterly accruals for each property
* Send out quarterly estimated capital emails to property management, compile estimated capital for the quarter for each property and send it to Asset Management, send final capital to the Asset Managers for each property
* Confirm quarterly capital and valuation models are uploaded into PEAK (home grown reporting site)
* Confirm occupancy data is accurate in PEAK on a monthly basis
* Work on multiple asset types (multi-family, industrial, office, regional malls)
* Review budget to actuals variances on a monthly basis and comment on any significant changes
* Complete trending analysis on a quarterly basis on 12 month rolling income statements per property
* Run Time Weighted Returns and Internal Rate of Returns from AEW home grown reporting systems
* Review returns for accuracy
* Within one year of working there, my property work load was doubled
* Responsible for the integrity and correct Chart of Account mapping from the third-party property management companies to AEW for each property
* Prepare fund level and investment level bank reconciliations which includes recording the banking for each of these bank accounts on a monthly basis (7 bank accounts)

Goals

* Participate in group accounting project (STREAMLINE) to make the accounting department and its employees more efficient and providing better tools for accountants to complete their job
* Took MIT Real Estate Class in May 2018
* Took NAIOP Course in October for real estate finance

Comments:

* Received a 4 out of 5 on my first review after only working there for 6 months (according to the assistant controller and controller, this is unheard of for someone in their first year to get that type of rating).
* Matt Haydis (Associate that left in AEW in May 2018), told me that it was a pleasure working with me and that I am one of the most detailed accountants he has worked with and appreciated me catching his mistakes
* On August 2, 2018, analyst Danielle H said thank you for catching discrepancies on the third page of the QIU and I am the only accountant that noted the change and no other account that she works with even noted it. She appreciates me paying close attention to the details and catching mistakes.
* Robin M, my controller, told me that PwC has nothing but great things to say about me (on 07/18/18). Not only with the audit but also with the accounting efficiency project.
* Stephanie C, a controller at AEW, also said PwC had very good things to say about me and were ranting and raving about me.

Other:

* On 03/30/18, I stayed 1.5 hours late to help with the malls audit, which was not my property or responsibility at the time
* 08/2/18 – continue to be the go-to person for one of the funds on extra ad hoc items that both Robin and Matt need help with including the RMC and the quarterly for this fund

**Awards:**

**Computer Systems Used:**

Windows 10, Microsoft, Chrome, IE, VPN, Jabber, Nuance pdf, home grown systems/programs

**Reference (who would give you a reference to describe your work performance Name & Title)**

* Taryn Fulchini - Associate
* Stephanie Curtis - Controller
* Joanna Chen - Associate



**Professional Work Experience**

**Name of Organization: Everwest Real Estate Partners**

**Title: Senior Property Accountant**

**Dates worked: 02/2016 – 05/2017**

**Report To: Porush Halfhil**

**Job Responsibilities:** (If there are more than 10 keep writing, the more info the better the story. Include accomplishments, projects, cost savings, processes put in place, system implementation, creation of spreadsheets, etc. These are bullet points and small phrases that trigger more thoughts.)

* Work on simple Mezzanine Loans
* Complete cash receipts, general ledgers entries and financial statement roll ups for fund level entities
* Produced operating financial statements for 15 properties
* Compile draw requests for capital improvement projects
* Tracking and creating job codes for all property entities’ capital projects
* Perform the monthly close cycle for 15 entities at the property level, including managing the Work In Process for each entity
* Facilitated the budget process for property level entities including creating budget manuals for internal and external use
* Perform property reconciliations for multiple properties and multiple tenants
* In dept experience with MRI accounting software
* Microsoft Word, Excel, Outlook, and AvidXchange
* Cost segregation entry for a 6-building asset
* I took the initiative to research and create a list of assets and the useful life of each asset (the idea to come up with this came from the corporate accountant). This has given the property accountants a tool to use in order to determine an accurate useful life for assets we capitalize. Gather/compile debt compliance documentation for entities
* Gather support for audits of funds
* Collaborate with team members on internal inefficiencies
* Communicated and developed a relationship directly with clients
* Helped make the property accounting department more productive and efficient.
* Participated in a tenant meeting with one of the directors for Travelport in order to determine the beginning stages of a parking agreement between Travelport and their employees.

**Awards:**

**Comments:**

* **Was going to be promoted into the corporate accounting position but gave the company a two-month notice that I was moving back to Boston and could not accept the promotion.**

**Computer Systems Used:**

**MRI, Avid Exchange, Microsoft Word, Excel, Outlook, Chrome, Windows 7 & 10**

**Reference (who would give you a reference to describe your work performance Name & Title)**

* Porush Halfhil – Fund Controller
* Kim Tran – Corporate Accountant



**Professional Work Experience**

**Name of Organization: Sierra Properties**

**Title: Senior Accountant/Property Accountant**

**Dates worked: 01/2014 – 02/2016**

**Report To: Wendy Wolfswinkel**

**Job Responsibilities:** (If there are more than 10 keep writing, the more info the better the story. Include accomplishments, projects, cost savings, processes put in place, system implementation, creation of spreadsheets, etc. These are bullet points and small phrases that trigger more thoughts.)

* Created budgets for different entities and input budgeted information into the accounting system
* Communicated directly with owners of buildings regarding financial information
* Performed property reconciliations for multiple properties including assisting external auditors with audits of reconciliations
* Initiated large dollar value wires for owners of entities
* Responsible for creating and sending out 1099’s for multiple vendors
* Provided assistance to property managers for requested matters
* Assisted CFO with processing health insurance benefits for employees
* Created multiple spreadsheets for the CFO and property managers to help in analyzing financial information
* In dept experience with Management Reports International (MRI) accounting software and Yardi Voyager accounting software
* Managed accounting software conversion and was responsible for the integrity of the data before and after the conversion
* Full cycle accounting – monthly close cycle for multiple entities
* Processed check runs (A/P) on a weekly basis
* Processed A/R on a daily basis
* Reconciled multiple entity bank accounts
* Helped CFO with putting together the financials for the management company
* Booked accruals
* Responsible for reading leases for tenants and determining what type of lease they had and what capital, if any, could be passed through to them
* Created amortization and cap schedules for capital that could be passed through to tenants on a yearly basis and determined what certain tenant’s cap on expenses were
* Learned about real estate accounting in this position (had no prior experience)
* Helped CFO clean up books and accounts since the last person in both of our position did not leave the accounting in a very clean place
* Always helping and figuring out IT issues

**Awards:**

**Comments:**

Made the check run process more efficient by having the property managers simply use a half page code slip and put that into one location that I would then review and separate.

Was offered a $6K raise to stay at the company instead of moving on to another company

**Computer Systems Used:**

MRI, Yardi, Windows 7, Microsoft Word, Excel, Outlook

**Reference (who would give you a reference to describe your work performance Name & Title)**

* Wendy Wolfswkinkel - CFO



**Professional Work Experience**

**Name of Organization:**

**Title:**

**Dates worked:**

**Report To:**

**Job Responsibilities:** (If there are more than 10 keep writing, the more info the better the story. Include accomplishments, projects, cost savings, processes put in place, system implementation, creation of spreadsheets, etc. These are bullet points and small phrases that trigger more thoughts.)



**Awards:**

**Computer Systems Used:**

**Reference (who would give you a reference to describe your work performance Name & Title)**





**Professional Work Experience**

**Name of Organization:**

**Title:**

**Dates worked:**

**Report To:**

**Job Responsibilities:** (if there are more than 10 keep writing, the more info the better the story. Include accomplishments, projects, cost savings, processes put in place, system implementation, creation of spreadsheets, etc. These are bullet points and small phrases that trigger more thoughts)



**Awards:**

**Computer Systems Used:**

**Reference (who would give you a reference to describe your work performance Name & Title)**





**Volunteer**

**Name of Organization:**

**Title:**

**Dates worked:**

**Report To:**

**Job Responsibilities:**



**Powerful statements that describe your professional achievements**





**References:**

Professional references are the key! You need to acquire references from where you worked or volunteered. You should be connected in LinkedIn with all of your references.



