

Frank Carlone III

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FINANCE AND ACCOUNTING POSITION

Experienced accounting and finance leader with over 15 years of experience. Software Developer with expertise in application development, proficiency in design, installation and testing. Track record of building and leading effective teams with a strong focus on process improvement as well as change and risk management. Highly focused on delivering superior value and positive, collaborative work environments that result in sustainable business growth.

Highly motivated life-long learner, consistently building new skills to drive performance.

- **Developed and implemented new cross-functional budget process resulting in forecasting improvements**
- **Reduced month-end close process from 10 days to 4 days**
- **Led the redesign of monthly financial statements, adding key metrics and ease of understanding**
- **Produced year-end schedules, submit taxes to federal, state, local tax agencies and partnership taxes**

SUMMARY OF QUALIFICATIONS

Financial Planning and Analysis	Budgeting/Forecasting	Vendor Management	Bank Reconciliation
Strategic Planning	Financial Statements	General Ledger Reconciliation	Federal/SALT Tax Filings
Accounts Payable	Accounts Receivable	Auditing	Capital Expenditures
ADP Payroll	Elite Enterprise	FRx Reporting	Crystal Reporting
JavaScript	React	Angular	Java/JAX-R
MySQL	Node.js	Git – Version Control	Ad Hoc Reporting

PROFESSIONAL EXPERIENCE

OPTIONS TRADER | Philadelphia, PA July 2021 – Present
Self-taught, self-funded options trader. Trading equity and index options. Generating profits through market analysis, risk management, and trade execution.

- **Market Analysis:** Review market conditions and trends. Analyze pre-market and post-market reports to evaluate market conditions.
- **Market Research:** Conduct research on companies' fundamentals and earnings reports to determine trade strategies.
- **Trade Execution:** Employ risk management and volatility assessment to make informed decisions regarding trade entry/exit points.

THE VANGUARD GROUP | Malvern, PA Jan 2020 – July 2021
SOFTWARE DEVELOPER

Selected to work on a key project to improve Vanguard's employee experience. Collaborated in daily scrum meetings and partnered with team members to track, triage, and resolve issues.

- **Launched successful website** – developed website allowing Vanguard employees to change account ownership for investments. Created a superior user experience that simplified processes. Beta testing results netted positive employee feedback.
- **Key technology:**
 - **Angular Reactive Forms:** Leveraged to collect values from user input, FormControls to track and validate input values, and FormGroups to collect data into a single group.
 - **Java Web Services:** JAX-RS to make request calls to retrieve account data, helping end users complete the Vanguard account owner transfer process.
 - **Agile Software Development:** Worked with team members and end users to delivery consistent program functionality based on collaboration with the end user.
 - **Atlassian/Jira:** Managed project progression, oversee workflow, issue tracking and control software release.

MONTGOMERY MCCrackEN WALKER & RHOADS LLP | Philadelphia, PA Apr 2008 – June 2015
CONTROLLER (Jan 2013 – Jun 2015) || **MANAGER OF FINANCIAL ACCOUNTING** (Apr 2008 – Dec 2012)

Led a team of 15 to deliver payroll and general accounting functions. Generated monthly financial statements and worked with external banks to produce quarterly reports. Led yearly accounting audit and annual budget process. Produced year-end schedules for partner distribution.

- **Budget Process:** Expanded budget process to include sub-expense categories and used Crystal Reporting and FRx Reporting to create template with monthly fluctuations enabling each department head to build monthly budgets and forecast expenses during the financial calendar.
- **Main Operating Account Reconciliation:** Resolved 2-year reconciliation error and developed permanent solution.
- **Monthly Financial Statements:** Added firm financial metrics, explanation of monthly variances, and redesigned monthly financial statements, promoting ease of understanding.
- **Management:** Moved recording of transactions from end-of-month to daily process, reducing general ledger entry error rates, and reducing month-end close from 10 days to 4 days.
- **Analyst:** Develop statistical analysis for general counsel and CFO for attorney professional liability insurance, management and employment insurance, fiduciary and crime/cyber insurance.
- **Taxes:** Primary contact with outside accounting firm to produce year-end schedules, submit taxes to federal, state, local tax agencies and partnership taxes.

LAVIN O'NEIL RICCI CEDRONE & DISIPIO | Philadelphia, PA 2007 – 2008
MANAGER OF FINANCE

Managed the firm's Financial Department; led team of 5. Responsible for accounts payable, accounts receivable, billing, general accounting functions and payroll. Generated financial statements for outside accounting firm and external financial institutions.

- **Monthly Financial Statements:** Prepared the firm's monthly financial statements for distribution to the firm's managing partners.
- **Tax Issue:** Resolved various tax issues regarding payroll taxes (form 941), Pennsylvania Sales & Use Tax and outstanding Philadelphia Business Tax owed from 2006.
- **Policy Changes:** Introduced and led the adoption of new policies for fixed assets and employee reimbursements.

SCHANDER HARRISON SEGAL & LEWIS | Philadelphia, PA 2000 – 2007
ASSISTANT CONTROLLER (Aug 2003 – Aug 2007) || **FINANCIAL ANALYST** (Dec 2000 – July 2003)

Led team of 3 employees responsible for accounts payable and general accounting functions. Prepared monthly financial statements for distribution to firm management as well as outside accounting firm and financial institutions.

- **Strategic Planning:** Assisted with firm's financial strategic planning with managing partner and senior management.
- **Month-end Processing:** Led month-end balancing process and corrected out-of-balance ledger codes and general ledger accounts.
- **Auditing:** Produced schedules for annual audit and established procedures based on audit recommendations.
- **Statistical Reporting:** Produced and analyzed firm statistics and schedules related to attorney credit hours, attorney and support staff full time equivalent and pro bono hours.
- **Monthly Reporting:** Processed monthly management reports for circulation to office managing partners, legal department heads, and practice group chairs.

EDUCATION

BA - Economics, LaSalle University, Philadelphia, PA
Full Stack Coding Bootcamp - Certificate, University of Pennsylvania, Philadelphia, PA
Software Web Development, Bloc
JavaScript & Java programming courses, Udacity
MySQL courses, Code Academy