

# Jazmin E. Ortega

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<b>Director of Fiscal Services</b>	San Gabriel Unified School District	2019-Current
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- Plan, organize, control and direct the District accounting finance and budget activities
- Prepare District budget and interim reports
- Plan, supervise and evaluate the performance of 2 Payroll Technicians, 2 Account Clerk III, and 1 Benefits Technician
- Maintain chart of accounts and provide consultation and training for 8 school sites and district administration
- Review and approve budget transfer request; maintain continuous cash flow accounts; monitor and control revenues and expenditures of all District funds
- Analyze financial data and prepare forecasts and recommendations
- Supervise and participate in the audit of the District
- Assist in the formation and development of policies and procedures related to compliance and best business practices
- Reconcile fixed assets and construction in progress accounting
- Participate on the District negotiations team

<b>Senior Associate</b>	CliftonLarsonAllen, LLP	January 2014-Present
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- Plan, manage and perform audit, review, and compilation engagements
- Design and perform substantive analytical tests and detail tests in audits of local agencies and non-profit organizations
- Responsible for detailed testing of transactions and substantive testing
- Presentation of year-end financial statements to Board of Directors for local agencies and non-profits
- Review and evaluate internal accounting controls and make recommendations to management
- Perform single audits under Uniform Guidance
- Track and manage the data collection process
- Supervise an audit team of 1 – 10 associates
- Perform controllership services for non-profit organizations
- Assist with fraud investigations of local agencies and non-profits, including interviewing, preparing and interpreting investigative results
- Perform consulting services for local agencies and non-profits
- Assist clients in implementing standards and monitoring appropriate accounting procedures
- Prepare and review compliance filings such as 990s, individual tax returns, and form 3500
- Participate in the recruiting processes for the firm, including interviewing potential candidates
- Participate in permanent curriculum trainings to 1<sup>st</sup> and 2<sup>nd</sup> year associates
- Participated as an instructor in the ULV REACH program, teaching over 50 high school students financial concepts, including personal finance.

<b>Payroll Clerk</b>	P&M Management	January 2013-October 2013
<b>Accounting Assistant</b>	P&M Management	October 2012-January 2013

## Education

<b>Bachelor of Arts in Accounting</b>	CSU San Bernardino, CA	June 2014
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## Attributes and Software Skills

- QuickBooks, PeopleSoft, Concur Solutions, Px Engagement, Creative Solutions of Accounting
- Quick, dedicated learner with strong analytical and problem solving skills
- Ability to plan, organize, manage and prioritize tasks and delegate tasks to team