

Steven M. Heizmann, CPA, CGMA

(240) 346-1379 • stevenheizmann@outlook.com

<https://www.linkedin.com/in/stevenheizmanncpa>

CERTIFIED PUBLIC ACCOUNTANT (CPA)

Certified Public Accountant, Chartered Global Management Accountant, Entrepreneur, Finance & Investing, Technology Guru, Lifetime Student

As a distinguished Certified Public Accountant and Chartered Global Management Accountant, Steven M. Heizmann brings a wealth of expertise in finance, investing, technology, and business management to his professional endeavors. His commitment to excellence is evident through his meticulous attention to detail, proactive attitude, and lifelong dedication to learning. Heizmann's academic foundation is solid, holding a Bachelor of Business Administration from Baylor University, where he excelled in Accounting and Finance, graduating in 2008. He achieved his CPA license in 2013, further solidifying his credentials in the financial field.

- Core Competencies -

- Expertise in AP, AR, account reconciliations, payroll, KPI analysis, and comprehensive financial reporting.
 - Proficient in oral and written communication, facilitating clear and effective interactions.
 - Skilled in federal and state tax preparation, ensuring compliance and strategic tax planning.
 - Exceptional attention to detail, enabling accurate and thorough financial analysis.
 - Collaborative team player with a positive outlook, enhancing team dynamics and productivity.
 - Advanced proficiency in QuickBooks and Microsoft Office Suite, streamlining accounting processes and data management.
-

PROFESSIONAL EXPERIENCE

TFC Consulting, Inc., Washington, DC

Certified Public Accountant & Financial Consultant (November 2023 – March 2024)

- Seasoned CPA with over 15 years of specialized experience in governmental auditing, proficient in enhancing financial systems and controls for effective governance and accountability.
- Enrolled in Certified Government Financial Manager (CGFM) and Project Management Professional (PMP) certification programs, exemplifying a dedication to mastering core competencies in government financial management and project oversight.

- Member of prestigious professional bodies including the Association of Government Accountants (AGA), AICPA, CIMA, MACPA, and GWSCPA, integrating best practices and emerging trends from a broad spectrum of accounting and management disciplines.
- Skilled in orchestrating and leading audit teams through complex engagements, fostering collaborative environments and driving high-performance standards.
- Proven excellence in analyzing and interpreting financial data to guide strategic decision-making and optimize budgetary performance.
- Track record of successful collaboration with key government entities, including active participation in joint task forces that underscore an expertise in compliance and regulatory frameworks.
- Demonstrates strong commitment to continuous professional development, actively pursuing opportunities to refine expertise in financial management and project leadership within the public sector.
- Recognized for a pragmatic and analytical approach to problem-solving, ensuring operational efficiency and organizational compliance with federal and state regulations.
- Leverages membership insights and resources from AGA and PMI to stay abreast of industry innovations, applying these to enhance the strategic capabilities of TFC Consulting.

Ryan & Wetmore, CPAs, LLC, Washington, DC

Senior Accountant (January 2023 – April 2023)

- Business Tax Specialist Skilled in Leading Software Applications
- Demonstrated proficiency in UltraTax tax software, skillfully navigating financial accounts with the use of Advanced Flow trial balance software in a focused and efficient work environment.
- Contributed to a harmonious team dynamic, supported by comprehensive in-house training tools such as educational videos.
- Excelled in a workplace culture cultivated by dedicated firm leaders who emphasize transparent and forward-thinking communication, achieving excellence in service delivery and client contentment.

Kelly & Company, CPAs, LLC, Washington, DC

CPA Manager (CPA) (June 2021 – September 2022)

- Managed a dynamic team of approximately five, specializing in comprehensive tax and financial auditing services, leveraging System Pro FX for advanced tax planning and forecasting.
- Entrusted with the most intricate tax returns and business scenarios, including expertise in handling Employee Retention Credit (ERC), showcasing exceptional problem-solving skills.
- Demonstrated proficiency in QuickBooks, serving as both a software consultant and a financial consultant, enhancing operational efficiency and client satisfaction.
- Conducted thorough reviews, compilations, and audits across a broad spectrum of small and medium-sized companies, with a particular focus on 401(k) and employee benefit plans, ensuring regulatory compliance and financial integrity.
- Recognized for delivering high-quality financial analysis and recommendations, facilitating strategic decision-making and fostering long-term business growth.

CPA TAX SHOP, Washington, DC

Practice Manager (CPA) (September 2013 – September 2019)

- ♦ Spearheaded bank reconciliations, investment analysis, general ledger account reconciliations, and month-end close procedures. Provided technical guidance and liaised with external auditors, contributing to streamlined operations and financial accuracy.

Broadcast Management Group, Washington, DC

Controller (January 2019 – May 2019)

- ♦ Through meticulous review and enhancement of auditing protocols, I identified and rectified discrepancies leading to significant financial savings. Additionally, I managed comprehensive bank and account reconciliations and streamlined the expense reimbursement process, substantially improving the organization's financial operations.

Vanda Pharmaceuticals, Washington, DC

Data Auditor (September 2018 – December 2018)

- ♦ Addressed data integrity issues and evaluated quality control reports, ensuring data accuracy and compliance.

SRL TotalSource, Waldorf, MD

Chief Financial Officer (CFO) (September 2017 – March 2018)

- ♦ Oversaw full accounting cycles, developed financial models, and ensured DCAA compliance, driving financial efficiency and strategic decision-making.

Salter & Company, CPAs, Bethesda, MD

Senior Auditor, Tax (March 2016 – September 2016)

- ♦ Led audit engagements, provided mentorship to junior team members, and conducted detailed financial and operational analyses across a variety of sectors.

EDUCATION & CREDENTIALS

Baylor University, Waco, TX

Bachelor of Business Administration, 2008

Major: Accounting

Baylor University, Waco, TX

Bachelor of Business Administration, 2008

Major: Finance

Certified Public Accountant (CPA), Maryland (#39208), 2013

Chartered Global Management Accountant (CGMA), AICPA, 2013

MEMBERSHIPS & ORGANIZATIONS

American Institute of Certified Public Accountants (AICPA)

Maryland Association of Certified Public Accountants (MACPA)

Greater Washington Society of Certified Public Accountants (GWSCPA)

Knights of Columbus – a Catholic religious fraternity

QuickBooks Online ProAdvisor, Intuit, 2013

Maryland Innovation Center

- Core SKILLS -

- Leadership & Teamwork
- Financial Reporting & Analysis
- Tax Preparation & Planning
- Budgeting & Forecasting
- Internal Controls & Compliance
- Account Reconciliations
- Auditing
- Management Accounting
- Financial Modeling
- Technology Proficiency
- Communication
- Problem Solving
- Project Management
- Leadership & Teamwork