JULIAN MERCER

CPA

San Francisco, CA | (415) 555-0148 | julian.mercer@email.com | linkedin.com/in/julianmercer

PROFESSIONAL SUMMARY

Licensed CPA and Audit Manager with 11+ years in public accounting, leading financial statement audits for privately held and PE-backed middle-market companies. Manages engagement teams and client relationships, and has strong experience with SOC reporting and technical accounting such as revenue recognition and leases.

PROFESSIONAL EXPERIENCE

Audit Manager Jul 2021 - Present
Crowe LLP, Chicago, IL

- Manage a portfolio of 9 audit engagements with combined client revenue of about $1.4 billion, delivering each on schedule and within budget.
- Supervise teams of up to six staff and seniors, and review about 60 workpapers a week before sign-off by the partner.
- Led the audit of a private equity-backed manufacturer's first ASC 842 lease adoption and resolved four material adjustments before issuance.
- Cut an audit's year-end fieldwork from 20 days to 14 by agreeing on a prepared-by-client list and early interim testing.
- Win add-on work by identifying control and tax issues, which brought in $180,000 of advisory fees from existing clients.
- Recruit at two campuses and mentor five seniors, three of whom were promoted ahead of schedule.
- Present audit results and control findings to client audit committees each year and field follow-up questions on accounting changes.

Senior Associate, Audit Jul 2018 - Jun 2021

- Ran fieldwork for 6 to 8 audits a year, preparing planning memos, risk assessments, and testing of revenue and inventory.
- Performed SOC 1 and SOC 2 testing for three service organizations and drafted the exceptions section for partner review.
- Developed an audit data analytics routine for journal entry testing used by the entire office on 20 engagements.
- Reviewed work by two staff each busy season, and their first-year reviews were rated above the cohort average.
- Prepared proposals and fee estimates for four prospective clients, three of whom signed engagement letters.

Staff Accountant, later Senior Accountant, Audit Aug 2015 - Jun 2018
Plante Moran, Southfield, MI

- Performed audit and review procedures for 15 clients in manufacturing, nonprofit, and real estate.
- Tested cash, receivables, fixed assets, and payables, preparing confirmations and proposing adjusting entries for senior review.
- Earned the CPA license in 2017 and promoted to senior ahead of the typical 30-month timeline.
- Presented findings and adjusting entries to controllers and CFOs at close meetings, and answered management's accounting questions.

CORE SKILLS

Financial statement audit | US GAAP and ASC 842 | Revenue recognition | SOC 1 and SOC 2 reporting | Risk assessment | Internal controls | Audit data analytics | Engagement management | Client relationship management | Staff review and mentoring | Tax awareness | CaseWare and Excel | Technical accounting research

EDUCATION

Master of Science in Accountancy, University of Illinois Urbana-Champaign, Champaign, IL

CERTIFICATIONS

Certified Public Accountant (CPA), Illinois | Certified Information Systems Auditor (CISA), ISACA