

# SALLY ROTHENHAUS

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860 – 341 – 2289 | sally.rothenhaus@gmail.com

## SUMMARY

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Bookkeeper, sole proprietor, trainer, problem solver, past stock broker, financial planner (CFP), and retail banker, with a strong creative streak. Organized and detail oriented. Proficient with and quick to learn technology and software. Excellent writing and speaking abilities. Professional, outgoing, and energetic with a positive attitude.

## SKILLS

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### Confidentiality

- Familiar with the compliance and confidentiality requirements of the accounting, tax, and banking professions.

### Technology

- Software:  
QuickBooks, MS Word, Excel, Publisher  
OpenOffice and LibreOffice Equivalents  
Inkscape, Scribus, and GIMP  
Adobe Lightroom, Photoshop, Indesign, Illustrator, and Acrobat  
Familiar with MS Windows, Linux (Ubuntu), iPad, Android, Html
- Additional Tech Skills:  
Wordpress Design and Content Management  
E-marketing using Constant Contact and MailChimp  
Social media savvy, including Facebook, Instagram, Twitter  
Recently assessed at over 10,000 keystrokes per hour, 97-100% Accuracy

## EXPERIENCE

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- September 2014 - Present    Bookkeeper, *Brewer Bruce & Johnson's Marina*
- Accounts receivable, slips and storage contracts, banking, labor. Create and maintain work orders through billing for busy, 650 slip marina. Primary customer contact point on all billing matters. Assist primary finance position with special projects. Work extensively with DockMaster, Excel, Word, Outlook.
- September 1992 - Present    Tax Advisor and Trainer, *Margaret Shepard d/b/a H&R Block*
- 22 years' experience finding opportunities to reduce tax burdens while preparing accurate filings for individuals and small businesses, including clergy, LLC, LLP, Alternative Minimum Tax, investors, retirees, and US citizens working abroad.
  - Facilitate 72 hour Comprehensive Basic Personal Income Taxes in a classroom setting, building a pool of qualified candidates for 'new hire' positions. Assist in maintaining high level of competencies by facilitating Advanced Topics Seminars for experienced tax preparers.

- March 2012 –  
January 2015
- Bookkeeper, *O'Connor Insurance Agency*
- Daily QuickBooks bookkeeping and other activities in support of the business owner and office manager. Interact with CPA and other professionals, meeting tax and other reporting deadlines. Frequent use of MS Office, including Word and Excel. Maintain confidentiality of company financial and payroll records and client information.
  - Assist with creating and maintaining corporate image as photographer - professional staff photography.
- January 2000 -  
Present
- Sole Proprietor & Professional Photographer, *cShoresal, Self-employed*
- Over 10 years' experience in the design, production, and marketing of custom photo gifts, including dye sublimation of cell phone cases, jewelry, medical alert, and other accessories. Retail sales and fundraising. All aspects of this business have been performed by me, including product design and marketing, web design, e-commerce management, and financial record keeping. Business includes online and event sales.
  - Frequent use of MS Word and Excel, Adobe Lightroom, Photoshop, and Indesign. Familiarity with Adobe Illustrator. Use of MailChimp for e-marketing.
  - Old Saybrook Chamber of Commerce Calendar – 2014  
Images published in this photo essay calendar featuring notable places and photographers from Old Saybrook.
  - Coastal Connecticut Magazine – Winter 2013 Issue  
Images published to accompany Sherri Daley's article, "A Stupa Grows In Old Saybrook". <http://www.coastalctmag.com/#!winter-2013/cvbq>
  - Hartford: Photo Essay - Hartford Business Journal, 2012  
Multiple images published in this photo essay on Hartford and the surrounding area. For use in corporate boardrooms and conference rooms, and for general interest reading. Photos include architecture, street scenes, patriotic and memorial, landscapes, musical instruments, and farm animals.
  - Connecticut's Fife and Drum Tradition - Wesleyan University Press, 2011  
Numerous images for photo-journalistic use in this history book covering a local genre of music and its traditions. Worked closely with the author and publisher to manage the preparation and organization of all images in this book, from various sources.
- September 2012 –  
September 2013
- Bookkeeper/Ass't to Dir of Operations, *Guest House Retreat and Conference Center*
- Daily QuickBooks bookkeeping and other activities in support of the Director of Operations. Maintained donor records and gift shop inventory. Responsible for creating e-marketing using Constant Contact. Frequent use of MS Office, including Word and Excel. Maintain confidentiality of company financial records and donor information.
- January 2000 -  
Present
- Bookkeeper and Trainer, *Self - employed*
- 15 years' experience providing accurate and timely bookkeeping and accounting services for small and medium sized businesses, using proprietary and commercial software.
  - Training for business owners and office personnel on the use of software and paper-based record keeping. Educate business owners and employees on the practical use of their records for meeting business planning goals.
- June 1985 – April  
1991
- Retail Banking and Broker, *Society for Savings*
- Built customer rapport as Customer Service Rep (Teller). Increased branch customer base while progressing through positions of Personal Banker and Acting Branch Manager, as well as Mortgage Originator and liaison to the Trust and Estate Planning Department. Built book of business as Registered Rep/Broker and Financial Planner.

## UN-PAID POSITIONS

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- Communications Manager – North Cove Yacht Club, Old Saybrook, CT. Produced monthly and other periodic newsletters, reports, flyers, and signage. Managed budget and directed committee.
- Cultural Arts Programming Coordinator for Elementary and Middle Schools - Event Programming - Successfully coordinated resources under time and financial pressures. Grant-writing.
- Home School Educator - organized and facilitated learning opportunities for family and homeschool association groups.
- Juvenile Diabetes Research Foundation: Mentor for families of those newly diagnosed with Type 1 Diabetes.
- Misc: Records keeping for several 501c3 Qualified non-profit organizations, including timely and accurate filings of IRS Form 990, 990EZ, and 990-N.

## EDUCATION

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| May 1983       | Bachelor of Science, <i>St. Lawrence University</i><br>Psychology, Sociology, Mass Communications, Economics<br>Emphasis in Marketing and Business |
| September 1995 | CFP; Certified Financial Planner, <i>College of Financial Planning</i><br>(Masters equivalent)   |