Lori R. McCoy

Qualifications Summary
Accounting professional with 12 years of experience as a Fractional Bookkeeper, Senior Accountant, and Assistant Controller. Proven expertise in cleaning up, setting up, and maintaining accurate books, reconciling balance sheet accounts, and ensuring materially correct and reliable financial reporting. Skilled at strengthening accounting processes, resolving discrepancies, and maintaining financial records that support informed business decisions.

Core Expertise
• Cleanup & Catch-Up Accounting • General Ledger Management • Financial Statement Preparation & Reporting • Reconciliations Specialist • Internal Controls & Accounting Procedures • Process Improvement & Workflow Optimization • Multi-Entity Accounting

Professional History

ASP	Consultant	2026 – Current
McCoy Business Solution, LLC	Consultant	2014 – Current
The DXA Group	Consultant	2021 – 2025
VertexCFO	Consultant	2024 – 2025
PhoneSuite	Controller / Director of Finance	2016 – 2021

Accomplishments
• Transitioned company from manual, paper processes to automated workflow and electronic filing and payment systems saving hundreds of man hours per year.
• Developed a monthly managerial financial reporting package providing insight into profitability allowing data-driven decision making resulting in considerable savings annually.
• Developed menu engineering and profitability reporting for a restaurant client to improve visibility into food costs, contribution margins, and menu performance.
• Transitioned company from in-house payroll preparation to an automated payroll processing company freeing up man hours, eliminating ‘guesswork,’ ensuring proper financial reporting of payroll information, and creating automation resulting in the mitigation of human error in payroll.

Education / Licenses
• Studies in Secondary Education

Software
• QuickBooks Online • QuickBooks Desktop • Bill.com • Salesforce • Avalara • 1Password • Gusto • ADP • SharePoint • DropBox • Clockify • Freshworks • ClickUp