

Charishma Pillarisetti

FP&A & Strategic Finance | Accounting, Reporting & Analytics

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EXECUTIVE SUMMARY - THE BOTTOM LINE

An FP&A and Strategic Finance professional who **turns financial records into decisions leadership can act on, not just reports they can read**. 4+ years across full-cycle accounting, financial reporting, variance analysis, and multi-state tax compliance, with an M.S. in Accounting & Financial Forensics (GPA 3.8) and Student of the Year honors (2024). The differentiator: accounting rigor and an FP&A lens in one person - fluent from the general ledger to the P&L narrative, and data-capable (Power BI, ML-driven analytics).

- **Close cycle cut 40%** - 10 to 6 working days - via reconciliation and close automation in QuickBooks.
- **Zero-error filing record** across every tax season (Form 1040, 1099, business returns).
- **45+ audit files per day** reviewed at Deloitte with root-cause tracing, not checkbox clearance.
- **Measurable downtime reduction** delivered from a Power BI predictive-analytics dashboard.
- **GAAP-compliant P&L, Balance Sheet, and Cash Flow** delivered on a fixed close calendar, every period.

CORE COMPETENCIES - MECE

DECIDE - FP&A & STRATEGY

- Variance Analysis
- Financial Modeling
- Budgeting & Forecasting
- P&L Ownership
- Management Reporting
- Data-Driven Decision Support

RECORD & PROVE - ACCOUNTING & COMPLIANCE

- Full-Cycle Accounting
- GAAP Statements (P&L / BS / CF)
- Journal Entries & GL Reconciliations
- Month-End / Year-End Close
- Audit Support & Controls
- Multi-State Tax & Payroll

AUTOMATE & ANALYZE - SYSTEMS & DATA

- QuickBooks
- Sage Intacct
- MS Dynamics 365
- SAP Finance
- Power BI
- Advanced Excel

PROFESSIONAL EXPERIENCE

Accountant & FP&A Analyst

Jun 2026 - Present

AA Innovations LLC | San Antonio, TX

Cut the close cycle 40% and connected every variance to the next forecast.

- Own the full close end-to-end (journal entries, GL reconciliation, month/year-end close), delivering GAAP-compliant P&L, Balance Sheet, and Cash Flow on a fixed calendar every period - so leadership always has decision-ready financials.
- Automated reconciliation and close templates in QuickBooks, cutting the monthly close from 10 to 6 working days - faster close, faster decisions.
- Analyze each budget variance to identify structural, seasonal, or one-time drivers and incorporate the findings into the next forecast - reducing forecast error every cycle.
- Reconcile AP/AR and monitor aging daily, flagging past-due invoices before month-end - collection risk caught before it compounds.
- Process multi-state payroll and administer federal, state, and local tax compliance - reducing cross-jurisdiction discrepancy risk.

Business System Analyst (Finance)

Jun 2025 - Jun 2026

Legion AI Systems Inc. | San Antonio, TX

Redesigned finance workflows to GAAP standards before exceptions could compound.

- Mapped finance workflows end-to-end and identified control gaps across AP, payroll, and reporting - rebuilding each process to GAAP standards and improving reporting accuracy and audit readiness.
- Codified process documentation, workflow diagrams, and internal control procedures that remained in daily use after team turnover - standardizing financial operations across departments.
- Maintained QuickBooks records for reconciliations, payroll support, and multi-state tax filings - zero missed filings across every deadline.

Investment Professional

Feb 2026 - Mar 2026

JP Morgan Chase | San Antonio, TX

Converted client goals into allocation plans grounded in regulation.

- Delivered goals-based financial planning consultations, converting client goals into allocation plans with defined risk and time horizons.
- Advanced SIE, Series 7, and Series 63 licensing to ground every recommendation in securities regulation.

Staff Accountant

Dec 2025 - Jan 2026

Communications International | Vero Beach, FL

Closed with audit-ready support and translated every delta into a decision.

- Reconciled GL accounts and posted accruals, prepaids, and deferred revenue - each entry backed by audit-ready support for a clean month-end and year-end close.
- Performed variance analysis in Excel, D365, and Sage Intacct, translating each delta into management reporting the team acted on.
- Built reconciliations and supporting schedules that cleared audit review without rework - strengthening internal controls and documentation standards.

Tax Professional

Aug 2025 - Dec 2025

H&R Block | Melbourne, FL

Filed what the law demands - zero-error across the entire season.

- Filed Form 1040 and business returns with a zero-error record across the entire filing season.
- Researched federal and state tax law changes before each window, catching filing-impacting updates before returns were submitted - maximizing deductions and compliance accuracy.

Accounting Assistant

Nov 2024 - Jun 2025

ML Tech Experts | New Jersey

Built the full statement suite from the ledger up.

- Built P&L, Balance Sheet, and Cash Flow statements under GAAP, tie-out checked line-by-line against the ledger.
- Filed Form 1040 and 1099s under PTIN authorization with a clean filing record.

Audit Associate Analyst

Sep 2022 - Dec 2022

Deloitte | Hyderabad, India

Proved why the numbers were right - 45+ files a day with root-cause insight.

- Processed 45+ audit files per day in Core Audit, organizing evidence that moved review decisions faster.
- Traced flagged discrepancies to their root cause and structured audit-compliant reporting clients could act on to prevent recurrence.

Accounts & Finance Intern

Sep 2020 - Aug 2022

Ringier Radio Entertainments LLP | India

Built the reporting and reconciliation foundation.

- Assisted the Account Manager with accounting data analysis, financial reporting, account reconciliations, and month-end closing - supporting accurate reporting and informed business decisions.
- Verified attendance and employee data, coordinated salary inputs, and maintained payroll documentation - supporting timely, accurate salary runs.
- Monitored receivables and followed up on outstanding payments to protect the cash collection cycle.

EDUCATION

M.S. in Accounting & Financial Forensics - Florida Institute of Technology | Melbourne, FL | Jan 2023 - May 2024

| **Student of the Year 2024**

Bachelor of Commerce - Bhavans Vivekananda Degree College | Hyderabad, India | Jun 2019 - Aug 2022 | **Student of the Year 2022**

CERTIFICATIONS

Sage Intacct Certification	2026
QuickBooks Certification	2025
U.S. Income Tax Preparation	2025
SAP in Finance	2024
Power BI	2023
National Stock Exchange of India	2022
SIE, Series 7 & Series 63	In Progress

SIGNATURE PROJECTS

GAAP-Compliant Financial Reporting Suite

Eliminated reconciliation discrepancies across all accounts to achieve error-free, audit-ready month-end closing - statements balanced by design, not by adjustment.

Predictive Maintenance Analytics Dashboard (Power BI)

Led a real-time predictive analytics project with statistical modeling and machine learning; identified operational anomalies as actionable signals that delivered measurable downtime reduction - analytics that changed a decision, not a chart.