

# ANITA VEGA, MBA

anitavega007@gmail.com | 310-930-4960 | [LinkedIn Profile](#)

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## Professional Summary

Results-driven Controller with extensive experience in financial management, accounting, and strategic planning. Proven expertise in financial reporting, budgeting, forecasting, and process optimization. Adept at leading cross-functional teams, ensuring compliance with GAAP/IFRS standards, and leveraging ERP systems to enhance operational efficiency. Strong analytical and leadership skills to drive business growth and profitability.

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## Key Skills

- Financial Reporting & Analysis
  - Budgeting & Forecasting
  - Internal Controls & Compliance
  - ERP & Accounting Software (Infor Cloud, Infor Syteline, Epicor, QuickBooks)
  - GAAP & IFRS Compliance
  - Strategic Financial Planning
  - Cost Reduction & Profit Optimization
  - Team Leadership & Development
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## Professional Experience

### ***Internal Revenue Agent | Department of Treasury – Internal Revenue Service***

Santa Ana, CA | 09/2024 – Present

Manager: Joseph Younan, Tax Exempt Government Entities

- Conducted full-cycle examinations of employee benefit plans—including 401(k), 403(b), profit-sharing, and money purchase plans—ensuring compliance with IRC Sections 401(a), 403(b), 457, and 4975.
- Audited financial statements, Form 5500 filings, actuarial reports, trust agreements, and investment statements to identify noncompliance and financial discrepancies.
- Researched complex tax law issues using Westlaw, Accurint, Internal Revenue Manuals (IRMs), and IRS Audit Techniques Guides (ATGs) to interpret regulatory requirements and precedents.
- Analyzed employer contributions, employee deferrals, loan balances, and forfeiture allocations to detect excess contributions, nondiscrimination failures, and vesting miscalculations.
- Investigated plan asset transactions, prohibited transactions, and party-in-interest dealings under IRC Section 4975 and ERISA Title I to identify potential tax liabilities and penalties.
- Reviewed trust reconciliations, payroll records, and financial ledgers to verify proper plan funding, compliance with IRC Section 415(c) limits, and timely deposit of elective deferrals.
- Assessed the tax treatment of early distributions, required minimum distributions (RMDs), and rollover transactions under IRC Sections 72(t) and 402(c).
- Issued IDRs, Summonses, and Revenue Agent Reports (RARs) to substantiate audit findings and propose tax adjustments.

- Utilized forensic accounting techniques to trace plan assets, detect fraudulent transactions, and verify the accuracy of tax-exempt status claims.
- Applied GAAP principles and forensic accounting methodologies to reconstruct incomplete or inaccurate financial records and substantiate audit findings.
- Led audit closing conferences, preparing written determinations and discussing tax law applications with taxpayers, CPAs, and legal representatives.
- Consulted with TE/GE Counsel, Employee Plans Technical Advisors, and the IRS Voluntary Correction Program (VCP) to resolve complex compliance issues.
- Evaluated tax positions using Revenue Rulings, Private Letter Rulings, and Tax Court Decisions, applying authoritative guidance to case determinations.

***Certified Tax Preparer | AV Financial Services***

Carson, CA | 12/2012 – 12/2024

- Processed tax returns and handled complex tax accounting and legal assignments with thorough knowledge of federal tax regulations.
- Applied professional accounting principles to analyze financial records and ensure compliance with tax liabilities.
- Researched and interpreted business and trade practices to identify tax issues and assess financial conditions.
- Analyzed corporate financial transactions to determine tax implications and optimize filing accuracy.
- Collaborated with accounting, legal, and tax professionals to resolve complex tax matters and provide strategic tax planning.

***Consultant, Finance & Accounting - Decision Resources Inc***

Pittsburgh, PA | 02/2024 – 08/2024

Supervisor: Ron McClellan, Director Professional Services

- Provided ERP consulting, training, and support for Infor CloudSuite Industrial (Syteline), enhancing system efficiency.
- Determined work requirements for new implementations and post-implementation projects.
- Conducted gap analysis between system functionality and client needs, ensuring optimal system utilization.
- Delivered project tasks on time and within budget while managing multiple projects simultaneously.
- Developed end-user training materials and documented business procedures for continuous improvement.

***Division Controller - Pioneer Solutions***

Santa Fe Springs, CA | 06/2023 – 12/2023

Supervisor: Walter Michalec, Chief Financial Officer

- Acted as subject matter expert in accounting and auditing techniques to resolve complex industry issues.
- Collaborated with internal stakeholders and executives to address emerging financial challenges and project needs.

- Developed written and oral communication materials including training documentation and process manuals.
- Implemented technology-driven solutions to streamline accounting processes and improve team efficiency.
- Reduced month-end close time by establishing structured journal entry processes and performing detailed account reconciliations.

**Controller - Arktura LLC**

Gardena, CA | 02/2019 – 05/2023

- Managed month-end, quarter-end, and year-end closing and reporting processes, ensuring timely and accurate financial statements.
- Allocated funds based on budget analysis, historical expenditures, and projected workload.
- Prepared budget submissions with supporting justifications and consolidated data for CEO review.
- Oversaw financial reporting using Syteline/CSI ERP and facilitated the ERP conversion from QuickBooks.
- Managed Human Resources, Accounts Payable, and Accounts Receivable, while maintaining robust internal controls.
- Construction industry accounting, Liens, and Notarized documents
- Prepared multi-state tax returns, sales tax filings, and property tax returns in compliance with regulatory requirements.
- Manages all administrative, financial/business systems, and forecasting activities of an executive unit to ensure that the fiduciary duties are carried out in an efficient and effective way, and to provide guidance in utilizing resources for an efficient and viable workforce.
- Plans, directs, and manages the financial and administrative activity for the organizational unit
- Develops, administers, and monitors the department capital and operating budgets
- Supports executive management in the development and implementation of strategic objectives
- Analyzes historical data, evaluates departmental processes, and assists staff members to develop goals, objectives, and key performance indicators; develops and evaluates department goals and objective
- Provides financial plans, projections, and forecasts for programs and projects, and analyzes financial impacts
- Directs, interprets, and presents complex budgetary/organizational analyses
- Reviews and analyzes expenditures, prepares budget variance and performance measurement reports, identifies variance trends, and implements corrective action as appropriate
- Assumes lead responsibility for the preparation and analysis of short-, intermediate-, and long-term budget projects
- Manages and directs research in all areas of capital and operational effectiveness as it pertains to resource allocation, budgetary, and strategic analysis
- Manages personnel activities for multiple departments under an executive officer, including staffing plans, recruitment and selection, performance reviews, policy interpretation, and issue resolution
- Intercedes on all budgetary and personnel discrepancies

- Manages accounting activities for multiple departments under an executive officer including payroll, accounts payable, general ledger, month- and year-end closeout activities, and issue resolution while maintaining robust internal controls.
- Monitors departmental compliance with audit recommendations
- Utilizes technology to create new analytical tools to provide departments with more accurate financial management and/or budgeting techniques
- Gathers or reviews capital project requests in order to identify funding sources and strategies and/or make recommendations for debt financing and capital program inclusion in adopted budget

**Senior Accountant - Nefab Packaging West LLC**

Rancho Dominguez, CA 03/2018 – 10/2018

- Conducted monthly closing and financial statement reporting in accordance with established guidelines.
- Reconciled bank statements and various balance sheet accounts to ensure accurate financial records.
- Developed budget/program processes and guidance to support financial management plans.
- Assisted with year-end audit activities and produced management reports for operational decision-making.
- Maintained internal controls to safeguard assets and ensure the integrity of financial information using Microsoft AX ERP.

**Controller - Brek Manufacturing**

Gardena, CA | 11/2016 – 03/2018

- Managed payroll, human resources, accounts payable, and accounts receivable functions.
- Prepared financial performance reports summarizing company business activity.
- Oversaw cash management and treasury operations to ensure liquidity and efficiency.
- Monitored manufacturing KPIs and reported on key performance indicators to executive management.
- Audited inventory, including finished goods, raw materials, and work in progress for accuracy.

**Plant Controller - Alpha Wire**

Carson, CA | 06/2014 – 10/2016

- Managed payroll, human resources, accounts payable, accounts receivable, and IT departments.
- Supported company integration efforts and implemented a software transition from SYMIX to BPCS. Utilizes technology to create new analytical tools to provide departments with more accurate financial management and/or budgeting techniques
- Directs the development, implementation, and monitoring of short- and long-range goals, objectives, budgets, schedules, and strategies
- Makes recommendations that effect financial and personnel resource usage control
- Supervises, trains, mentors, and motivates assigned staff
- Maintains, supports, and promotes a safe work environment while complying with all of company's safety rules, policies, and procedures
- Contributes to ensuring that the Equal Employment Opportunity (EEO) policies and programs

- Led month-end closing, journal entry preparation, and financial statement production.
- Ensured compliance with SOX requirements and internal control policies through rigorous audits.

***Accounting Manager - Tomorrow Inc. and Institute of Common Sense***

Torrance, CA | 04/2009 – 06/2014

- Implemented computerized accounting systems and maintained effective inventory controls.
- Managed accounts payable, receivable, and payroll operations for efficient financial processing.
- Prepared year-end financial statements and comprehensive compliance reports.
- Collaborated with clients and vendors to resolve discrepancies and improve financial reporting accuracy.

***Accounting Manager - Service Solutions***

Fullerton, CA | 2006 – 04/2009

- Integrated QuickBooks as the primary accounting software to improve data accuracy and process efficiency.
- Developed and implemented internal controls for both office and remote teams.
- Managed accounts payable, accounts receivable, and human resources operations.
- Streamlined reconciliation processes and enhanced overall financial reporting practices.

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## Education & Certifications

**Masters in Business Administration, Accounting – Kelly Graduate School, 2012**

**Bachelor of Science in Business and Accounting – DeVry University, 2006**

**Notary Public, Commission expires 02/2029**

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## Software & Tools

- ERP Systems: Infor Cloud, Infor Syteline, Epicor
- Accounting Software: QuickBooks
- Financial Analysis Tools: Excel