



**Michael F. DeAngelis**  
**Financial Consultant**  
WorkPlace Dynamics, Inc.  
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#### **Professional Statement:**

To apply my financial and managerial expertise for the success of a corporation, non-profit organization, or individual

#### **Experience Summary**

- Financial Consultant
- Bookkeeper
- Mortgage Advisor
- Mortgage Originator
- Database Management

#### **Education**

- Bachelors of Science in Finance, Cum Laude, Rhode Island College, 2006
- Minor in Economics, Cum Laude, Rhode Island College, 2006

#### **Technology Expertise**

Proficient with Microsoft Excel, Microsoft Word, Microsoft Outlook, Microsoft PowerPoint, FileMaker Pro, Calyx Point, Minitab Statistical Software, QuickBooks, QuickBooks Pro, QuickBooks Non-Profit Edition, QuickBooks Premier Accountant Edition, and Peachtree Accounting Software.

#### **Professional Experience**

Workplace Dynamcis, East Providence, RI, 2006-Present

Position: Financial Consultant and Bookkeeper for a variety of organizations, non-profit and for-profit, with budgets ranging from \$300,000.00 -\$1,000,000.00



*Responsibilities include*

- Operate computer programs with accounting software to record, store, and analyze financial data
- Comply with federal, state, and company policies, procedures, and regulations
- Analyze past and current financial reports for accuracy
- Spreadsheet and database construction
- Prepare financial statements
- Compile statistical, financial, accounting, audit reports, and tables
- Audit compliance
- Prepare budgets and record information; develop financial timelines
- Prepare individual, corporate, and non-profit income tax returns
- Prepare materials, books, and records for annual audits

Independent Mortgage Advisor & Originator Consultant, Bristol, RI, 2006-Present

*Serve as an intermediary between borrowers & lenders; Responsibilities include*

- Originate mortgage loan applications
- Pre-qualify prospective borrowers
- Complete loan applications; attend loan closing
- Advise borrowers on loan structure best suited to fit their individual needs
- Developed a network base of Realtors, Financial Advisors, Insurance Agents, C.P.A.'s, Title Attorneys and Account Executives at wholesale lending institutions
- Track and analyze mortgage rate data and market trends, daily

**Additional Training**

*AICPA & Leadership Training*

Tax Exempt Organizations: Tips for Obtaining and Maintaining Your Exemption  
Taxation of LLCs, LLPs, and Other Partnerships  
AICPA Individual Tax Returns Workshop  
Form 990 Training  
Surgent & McCoy, LLC Training: Basic Audit Staff Training, Level 1  
Emerging Leaders, an Experiential Guide