Wei Chen-Patterson

Senior Bookkeeper and Team Lead | Bookkeeper | Accounting Clerk

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PROFESSIONAL SUMMARY

Senior bookkeeper and bookkeeping practice lead with fourteen years in small-business and not-for-profit accounting. Manages a portfolio of 35 clients, leads three bookkeepers, and handles GST, PST, payroll remittances, T4s and year-end files for the firm's accountants.

PROFESSIONAL EXPERIENCE

Senior Bookkeeper and Team Lead

Jan 2019 — Present

False Creek Business Services · Vancouver, BC

- Lead three bookkeepers serving 35 small-business and not-for-profit clients, reviewing their reconciliations and month-end checklists before files go to the accountants.
- Designed a standard client setup in Xero with Dext and Plooto, used for every new client and cutting onboarding from weeks of back-and-forth to a few meetings.
- Prepare GST and PST returns and payroll remittances for client companies, keeping a calendar of every filing deadline across the portfolio.
- Train new staff on the firm's chart of accounts, review standards and client communication, and wrote the internal bookkeeping manual.

Bookkeeper

May 2014 — Dec 2018

Coast Range Community Services Society · Burnaby, BC

- Kept the books for a not-for-profit with government and foundation funding, tracking each grant separately and preparing funder reports.
- Ran payroll for 70 staff, issued T4s and records of employment, and reconciled remittances to the CRA each quarter.
- Prepared audit schedules for the annual audit and answered auditor requests, which shortened fieldwork in later years.

Accounting Clerk

Jun 2011 — Apr 2014

Fraser Delta Import Co. · Richmond, BC

- Processed payables and receivables for an importer in Sage 50, including foreign currency supplier invoices and customs payments.
- Reconciled US and Canadian dollar bank accounts monthly and kept the inventory receiving records matched to supplier bills.

EDUCATION

Diploma, Accounting — Pacific Harbour Institute of Technology *2011*

SKILLS

Technical: Client portfolio management, Xero, QuickBooks Online, Sage 50, GST and BC PST, Payroll remittances and T4s, Year-end working papers, Not-for-profit fund accounting, Team leadership, Process documentation, App stack setup (Dext, Plooto), Mandarin (fluent)

Certifications: Xero Advisor Certification · QuickBooks Online Certified ProAdvisor