

# Betty Luna

Louisville, CO 80027

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+1 303 517 6730

Authorized to work in the US for any employer

## Work Experience

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### **Administrative Assistant**

Phoenix Financial Group - Westminster, CO

March 2014 to July 2020

- Performed complete financial analysis and submission to the Internal Revenue Service and/or State agencies for clients.
- Drafted quotes and negotiated amounts for services performed for clients.
- Assisted in the filling of tax returns, documents, affidavits and other papers related to the required services.
- Performed in depth ongoing research of annual changing Federal and State rules and regulations, in accordance to the tax law.
- Composed oral and written representations for clients as it pertains to matters administered by the government agencies.
- Handled client service concerns and complaints by phone, electronic mail, and in-person.
- Conducted full investigations of client's accounts, created breakdowns, and presented this information to the client and/or government agencies in a timely manner.
- Submitted appropriate forms as pertaining to each case; i.e. appeals, holds/extensions, and formal proposals to the government agencies.
- Trained new staff on the tax laws, use of computer programs, and all other duties required for the functioning of the work processes.
- Maintained and compiled Microsoft Excel spreadsheets and all data entry.
- Assisted in A/R and A/P with all client transactions and percentages of service funds to the employees.
- Managed time sensitive calendar events; set/canceled appointments.

### **Paralegal/Client Liaison**

Offices of Custer Roberson - Westminster, CO

August 2012 to January 2013

- Collected confidential information from various sources necessary to begin the legal process for bankruptcy purposes for each client.
- Carried out legal research aimed at finding out proceedings relevant to a case, statutes, and or court proceedings.
- Drafted legal documents such as notice of motions, along with court/client correspondence.
- Prepared court cases as far as legal arguments, opening/closing statements, pleadings and motions.
- Retained a firm grasp on court proceedings, as well as all database and/or office duties necessary for the position.

### **Administrative Assistant**

Larson Financial, Inc. - Westminster, CO

April 2010 to June 2012

- Executed similar duties as my position at Phoenix Financial Group.
- Assisted with reception/front desk, along with performing all general office duties.

## Education

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### **College Degree in Business Administration**

Metropolitan State University of Denver - Denver, CO

August 2003 to May 2006

## Skills

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- Legal Research
- Financial Analysis
- Personal Assistant Experience
- Calendar Management
- Events Management
- Legal Drafting
- Microsoft Outlook
- Event Planning
- Tax Experience
- Office Management
- Financial Report Writing
- Adobe Acrobat
- Negotiation
- Accounts Receivable
- Databases
- Writing Skills
- Budgeting
- Administrative Experience
- Proofreading
- Transcription
- Accounting
- Sales
- Filing
- Computer skills
- Litigation
- Typing

## Languages

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- English - Expert
- Spanish - Fluent

## Additional Information

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I accomplished multiple reviews and promotions by demonstrating extreme work ethic, achieving well beyond what was requested of me, providing exceptional client services, as well as by demonstrating knowledge of all areas of my job duties. Former first chair paralegal and the "go-to" employee for managers/owners of prior companies.