



Ludella Lewis & Company

Accounting, Taxes and Consulting

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Type of Business: Accounting Firm

Marketing Area: National

President/CEO

Duties: Managing Staff, Preparing Bids, Subcontracting others as needed; Drafting Reports.

Expertise: Ms. Lewis' expertise is in Accounting, Taxes & Consulting and Mentoring.

Affiliations / Organizations

1. Illinois CPA Society (Audit & Assurance Committee 2001 to present). 2nd African American Female to serve on Committee. 1st served from 6/1/97 to 5/31/98
2. American Institute of Certified Public Accountants (AICPA)
3. Institute of Internal Auditors
4. Listed in Illinois Production Guide - (Film)

Ludella Lewis & Company founded in 1987 and Incorporated in 2005

A Professional Courtesy One To Another

What distinguishes Ludella Lewis & Company? It's our commitment to providing the highest level of quality service to our clients. We listen to your concerns, ask the right questions and take the time to understand your goals and objectives.

The first key to success in business is to know whether you are making money and where that money is going.

Businesses should generate 1) information and develop insights that will result in improved controls and safeguards leading to greater efficiencies, 2) well-organized financial records that ensure business operations will run more efficiently on a daily basis. The financial community respects clear, concise and understandable financial reporting.

Contracts Awarded (not all-inclusive)

Metropolitan Pier and Exposition Authority, Durkin Condominium Association, The City of Chicago-Department of Finance, UIC-Athletic Department, William Leonard Library District, Best Form Fabricators/H&H Properties, 255 Graphics d/b/a Alphagraphics, Tight Klique Productions, Chicago Park District/Future Teachers of Chicago, Title XX Day Care Program audits, UIC-Grants and Contract (Chicago Consortium for Minority Business Student Advancement, Hispanic Transfer Initiatives, Illinois Partnership for Business Development and Illinois Engineering Grant Program)

Accounting, Tax Preparation & Consulting Services (not all-inclusive)

1. Monthly Financial Statements
2. Financial Planning
3. Cash Flow Analysis
4. Payroll Services
5. Cash Management Services (Incl. Budgeting Services)
6. Film Tax Credits Calc
7. Royalties Calc

Tax returns preparations – federal and state individual, business, payroll and sales tax returns & other tax returns

1. Review of past filings
2. Tax Planning

Consulting Services

1. Contract Analysis
2. Incorporation completion and filing
3. Financial Forecasts and Projections
4. Benefits Administration - Employee Benefit Funds
5. Notary Public Services
6. Retirement Benefit Plan Insurance
7. Unemployment Insurance
8. Other Financial Services

Education Degrees:

Bachelor of Science in Business Administration, Roosevelt University (1980)

Citation of Meritorious Achievement in Business Administration, Cambridge England IBC 1995

Decree of Merit – Ph.D., Accounting and Business Cambridge England IBC 1994

Work History:

1. Robert Half International June 1991 – April 2003, Chicago, Illinois 60601 Contracted Accounting Employment.

a. Analysis/Reconciliation - *Arthur Andersen-Benefit Dept*American College of Healthcare Executives *Computer Learning Center*Bismarck Hotel*Hilco/Great American Asset Management*MBM Company *Lee Hills – Advertising*Urban Gateways*Compass Management & Leasing*Oak Park Hospital*National PTA

b. General Ledger (Cost Allocation) *HIRMI (Humboldt Infant Mortality Reduction Initiative)*Marcy Newberry *Deborah's Place-Homeless Shelter for Battered Women

c. General Ledger * Computer Adaptive Technologies*Chicago Housing Authority- Tenant Accounting*World Paper Inc (transportation) Center *Diecrafters Inc*Genesis Clinical Laboratory*Newark's Electronics*Ramada Inn – Lake Shore*Alpha Graphic Inc*Rush Partners Inc (Construction projects for CPS)

d. Budgets*Chicago Housing Authority- Economic Development*Chicago Center for Health System Development (Cost Allocation Plan)

e. System Conversion: Data Entry/Reconciliation*Baker & McKenzie Basic*Marshall Fields (Inventory)*Jaffa Candies

f. OIG Audit Assist – Chicago Board of Education. – Hawthorne Accounting & Bookkeeping Services

g. Analysis/Reconciliation Banks/Investments*Zurich Kemper Investments*Old Kent Bank*Marquette National Bank*Citibank*Corus Bank

2. Village Treasurer/Budget Director Village of Robbins May 1990 – June 1991, Robbins, Illinois 60472 Treasurer /Budget Director

a. Treasurer – Custodian of all funds belonging to the Village to include Police Pension Fund, Firemen's Pension Fund and Public Housing Police Fund. Analyzed reports on financial institutions for investment of Village funds. Invested Village funds into the Illinois Public Treasurer's Investment Pool. Maintained separate account for real estate taxes; submitted monthly and annual Treasurer's Report. Prepared Anticipated Revenues by Funding Source Ordinance: recommended implementation of multi-user system.

b. Budget Director – Assisted the Mayor in the maintenance of departmental budgets. Recommended and implemented

procedures for the rebuilding of financial records to include compilation of financial statements for the fiscal year ended April 30, 1990 and audit as requested by the Office of the Comptroller. Worked with independent auditors for compliance deadline.

3. Supervising Senior Auditor November 1984 – December 1988 Edward Wright & Company, Ltd., Certified Public Accountants (formerly Lolles, Wright & Company) Chicago, Illinois, Independent contractor 1989 - 1991

a. Services to include preparation tax returns. Clients included manufactures, universities, government service and not-for-profit agencies and others

EXTRACT OF EXPERIENCE Responsible for all phases of field work, reviewing work papers; drafting audit reports; assist preparing management letter; completing the field work on schedule; resolving day-to-day audit client problems; supervising assistants; monitoring and reporting daily to partner. Provided consulting, accounting and review services

DETAIL – Under Edward Wright & Company CPA

University of Illinois at Chicago – Athletic Department

Office of Business Affairs, Chicago Illinois

Fiscal Year End 6/30/86, 6/30/87, 6/30/88 & 6/30/89

Audit of expenditures and compliance with NCAA guidelines

University of Illinois at Chicago – Grants and Contracts (m/c 551)

Audit of and program compliance as well as evaluation of grants

PROGRAMS

1.Chicago Consortium for Minority Business Student Advancement, Fiscal Year End 6/30/91

2.Hispanic Transfer Initiatives, Fiscal Year End 6/30/91

3.Illinois Partnership for Business Development, Fiscal Year End 6/30/91

4.Illinois Engineering Grant Program, Fiscal Year End 6/30/89, 6/30/90 & 6/30/91

Government and Not-for Profit

Northeastern Illinois Planning Commission (NIPC)

Fiscal Year End 6/30/86, 6/30/87 & 6/30/88

Financial audit in accordance with OMB Circular A-128 Audits of State and Local Government

Community Development Center – Community Development Block Grant/Special Audit Village of Robbins, Robbins, Illinois
Program Year 9/30/84, 9/30/85 and 9/30/86 Special Audit

Substance Abuse and Alcohol Treatment Center Inc (SAATC)

Fiscal Year End 6/30/84, 6/30/85, 6/30/86, 6/30/87, 6/30/88 & 6/30/91

Agency Wide financial and compliance with DASA requirements audit

Englewood Health Services Inc

Fiscal Year End 6/30/88 & 6/30/89

Financial and program compliance audit

Private Industry Council SDA – 21

Fiscal Year End 6/30/87 (Wrote Proposal)

Audit of Federal grants awarded through DCCA and audit of Job Training Partnership Act grants

Title XX Day Care Program Audits

Bray Temple Day Care Center

Fiscal Year End 6/30/87, 6/30/88, 6/30/89 & 6/30/91

Chaney Ford Child Care Center

Fiscal Year End 6/30/87, 6/30/88 & 6/30/89

Millard Ogden Day Care Center

Fiscal Year End 6/30/87, 6/30/88, 6/30/89 & 6/30/91

Under Lolles, Wright & Company CPA

Department of Human Services -
Child Care Food Program and Summer Food Program
1984 and 1985 Claims and compliance audit

Job Training Partnership Act (JTPA)
1984 and 1985 Financial and compliance audit

Mayor's Office of Employment
1984 and 1985 Compliance audit

4. Chief Accountant, Pyramidwest Realty and Management, Chicago, Illinois 1979 – 1982

a. Audited corporate restoration and investment accounts. Supervised accounting department. Provided written and oral reports to management. Worked with independent auditors (quarterly –10Q and annual – 10K)

5. Roosevelt University, Chicago, Illinois, Purchasing Clerk (College Work Study) 1978 - 1979

6. Loop Junior College (currently Harold Washington College), Chicago, Illinois Treasurer's Office – financial aid (College Work-Study) 1975

7. Aldens, Inc., Chicago Illinois, Billing Department and Sears, Chicago, Illinois, Accounts Receivable/Billing

Volunteer:

1. Participated as a Chicagoland Chamber of Commerce's YMP (Youth Motivation Program) Business Coordinator for School Years 1995/96, 1996/97, 1997/98 & 1998/99. Liaison between the assigned High School, the participating companies and the Chicagoland Chamber of Commerce

Speaker - Certificate of Appreciation in Career Guidance through the Youth Motivation Program 1989

Part of a group of Business Professionals volunteering in 400+ schools across the Chicagoland area encouraging students to complete High School and if a dropout to go back and finish one Student at a time

2. 12th & Christian, Community Organization, Chicago, Illinois 60623 - Board of Directors, Treasurer 1983/84

3. Teaching National College of Education School of Continuing Studies (currently National Louis University) Instructor, Business Organization and Management 1981

Past Associations

Commercial Law League of America – Alternative Dispute Resolution Committee, Office Management and Economics Committee & Forwarders & Receivers Committee

Career Achievements:

1. Illinois CPA Society (ICPAS) - (Audit & Assurance Committee (May 2001 to Present) 2nd African American Female to serve on Committee 1st served from 6/1/97 to 5/31/98;

One of the activities of the Committee – Review exposure drafts of propose audit, attestation and quality control standard revisions issued by the AICPA, PCAOB & ARSC and provide timely responses directly to those organizations.

Single best experience – Committee accepted some of my contributions to include in the comment letter and to see some (not all) of the comments addressed by the organizations.

2. ICPAS Legislative Contact and AICPA Federal Key Person 2003 - Present

Single best experience – Work with a group of volunteers who contact Legislators at the State and Federal level to bring to their attention House/Senate Bills supported by the organizations. See ICPAS Capitol Dispatch for list of legislation passed.

Charity- Donations: Greater Chicago Food Depository; American Red Cross; The Salvation Army, Chicago Gun Turn-in Program, Heartland Alliance for Human Needs & Human Rights, Schomburg Center for Research in Black Culture – NPL, And Other Organizations

Number of Years in Profession: 32 Number of Years in Current Position: 23

Attributes success to her faith in God, and the support she received from her parents and mentors.

Awards/Honors:

Marquis Who's Who of American Women in Finance and Industry 1987 16th Ed

American Biographical Institute - ABI

International Book of Honor ABI 1995 4th Ed

International Professional and Business Women's Hall of Fame ABI 1995 13th Ed

Most Admired Women of the Decade ABI 1995 Ed

Women's Inner Circle of Achievement 1996 ABI 1996 Ed

Most Admired Men and Women of the year ABI 1994-1996 1st -2nd Ed

2000 Notable American Women ABI 1995-1996 7th-8th Ed

International Who's Who of Professional and Business Women ABI 1996-2001 5th-7th Ed

ABI Fellowship - Life Member ABI Ed

International Biographical Centre – IBC

Decree of Merit Diploma (PhD) 1994 IBC 1994 23rd Ed

Citation of Meritorious Achievement for Business Administration IBC 1995 13th Ed

Honory Appointment to Advisory Council IBC 1995 Ed

Dictionary of International Biography IBC 1996 23rd Ed

International Who's Who of Intellectuals IBC 1997 12th Ed

Twentieth Century Award for Achievement IBC 1999 Ed

Research Board of Advisors IBC 2003 Ed

World Who's Who of Women IBC 1995/2000 15th-16th Ed

International Woman of the Year IBC 1996-1997 Ed

IBC Annual Fellowship IBC Ed

Who's Who Worldwide Registry NY 1993-1994 Ed

Cambridge Who's Who Registry of Executives, Professionals 2007-2008 2011-2012(VIP) Ed

Stanford Who's Who Registry of Executives, Professionals 2010-2011 Ed

Continental Who's Who of Executives and Professionals 2010-2011 Ed