Susan E. Poliquin, CPA, MBA, APA
804 Sunny Brook Dr.
Leander, TX 78641
Telephone: 210-279-5264

BUSINESS EXPERIENCE:

Definiti, LLC
The Woodlands, TX 77380
Director, Document Services
May 2022 – Present

Direct team of Document Specialists to ensure compliance with Internal Revenue Service and Department of Labor regulations related to retirement Plans. Actively coordinate and participate in acquisition activities as part of the corporate growth model.

Map Retirement, Inc.
Appleton, WI 54914
Director of Documents & Research
December 2019 – May, 2022

Document design, drafting and consulting for staff and clients of Map Retirement. Technical research and training for owners and staff on retirement, regulatory, tax and business matters.

ASC Institute, LLC
Independent Contractor
September, 2018 – December, 2019

Edit Cycle 3 Retirement Plan Documents and Forms; Review and update DGEM User Manual; Special Projects

Susan E. Poliquin, CPA
Schertz, TX 78154
2012 – Present
Tax preparation for Individuals, Trusts, Estates and Small Business; bookkeeping and consulting.
February 2012 – Present
Full-Time June 2018-December 2019 (remaining time – part-time)
Provide Retirement Plan Document Support and special projects for ASC Institute, LLC as an independent contractor.

Third Party Administrators, Inc.
Manchester, NH 03102
June 2002-June 2018
Document Compliance Manager (2002 – 2018)
Flexible Benefits Manager (2002 – 2018)
Conversion Manager (2002 – 2010)

Design and draft retirement plan and flexible benefit plan trust documents; prepare all regulatory and voluntary amendments to Plans; assist clients through voluntary compliance programs; provide regulatory/compliance guidance to Pension Consultants; supervise staff in daily administration of Flexible Benefits Department (Health FSA, HSA, POP, DCAP); Retirement Plan Conversion activities; Oversee the billing process and participate in various Accounting functions for the firm.

Sheehan, Phinney Bass + Green, P.A.
Sheehan, Phinney Tax Group
Manchester, NH 03105-3701
2000 – 2002 Tax/Probate Paralegal

Individual, Trust and Estate tax preparation; counseled and assisted executors through the probate process; prepared all Probate Court filings, Inventories and annual Accounts for decedent estates, Trusts and Guardianship/Conservatorships. Provided corporate tax preparation and planning for clients of Sheehan, Phinney Tax Group. Created accounting records and prepared financial statements for corporate clients in conjunction with corporate tax services.

TEACHING EXPERIENCE:

Texas A&M - San Antonio
Adjunct Faculty
August 2018 – Present

Courses taught: Principles of Financial Management; Principles of Managerial Accounting; Accounting for Non-Accountants; Intermediate Accounting II

ITT Technical Institute
San Antonio, TX
Adjunct Faculty
September 2013 – September 2016

Courses taught: Principals of Accounting; Managerial Accounting; Introduction to Business; Accounting for Non-Accountants; Finance

Fundamentals; Group Theory; Business Capstone; Business Negotiations

Southern New Hampshire University
Salem, NH
Adjunct Faculty
March, 2007 – August, 2011

Courses taught: Financial Accounting, Managerial Accounting, Federal Taxation I, Federal Taxation II

EDUCATION:

Southern New Hampshire University
Manchester, NH
Master of Science in International Business
Master of Business Administration (MBA)
BS in Business Administration

McIntosh College
Dover, NH
AS in Accounting
CPA Trak program

COMMUNITY:

Schertz Humane Society
Treasurer/Board Member;
2015 – Present

Bookkeeping, financial statement preparation, work with outside CPA in annual tax preparation and audit; fundraising; policy making

PROFESSIONAL DESIGNATIONS:

Certified Public Accountant (CPA) – State of TX
Accredited Pension Administrator (APA) - NIPA

REFERENCES: Available upon request.