James Gerstner

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EDUCATION

Brigham Young University – Marriott School of Business Provo, UT
Bachelor of Science, Accounting *August 2025*

- GPA 3.9/4.0
- *Marriott School of Business Dean's List* (top 5%) Winter Semester 2023, Spring 2025
- Relevant Coursework: Accounting Information Systems, high-level COSO, COBIT, and ITGC

EXPERIENCE

Larry Cox and Associates CPA (*Regional Accounting Firm*) Lehi, UT
Client Tax Manager *August 2026 – September 2026*

- Advised clients on tax strategies and financial obligations to employees, the IRS, and CPA/Law firms
- Analyzed financial data for partnerships, corporations, and non-profits to assess tax compliance
- Streamlined employee training by consolidating dozens of documents into a comprehensive manual

Redrock Payments (*Payment Processing Independent Sales Organization*) Grayson, KY
Sales Representative *September 2025 – April 2026*

- Analyzed transaction volume, industry, location, and owner preferences to develop competitive, mutually beneficial proposals with clear costs and savings estimates
- Met directly with SMB decision-makers to explain processing costs, answer questions, and build trust

The Back Nine Golf (*Indoor Golf Simulator*) Carmel, IN (Remote)
Bookkeeping Intern *January 2025 – April 2025*

- Classified transactions using QuickBooks for CPA review in preparation for tax filing
- Automated recurring journal entries in QuickBooks for subscriptions in accordance with ASC 606
- Reconciled monthly bank and credit card statements via QuickBooks and PDF files

TECHNICAL PROJECTS

Independent Project - Financial Systems Integration Platform (The "Wheel")

- Developed a financial data integration and reconciliation platform to match bookkeeping records with third-party transactions using Python, Flask, PostgreSQL, MCP servers, and agentic AI
- Established a written AI governance constitution defining agent permissions, responsibilities, and prohibited actions; reviewed AI-generated changes for compliance
- Built API-driven financial integrations with data validation, deduplication, and traceability, incorporating confidence-based reconciliation to identify and explain transaction matches

Team Project – Accounting Technology Education Platform

- Coauthored a peer-reviewed research paper on technology in accounting education, published Mar '26
- Co-developed TechHub.training, an educational platform featuring 260+ technology challenges, reaching 11,000+ unique visitors with 168,000+ content views at time of publication
- Ranked as the platform's leading contributor in educational topics, posts, and community engagement

AWARDS, SKILLS & INTERESTS

- Technical competence in Excel, Alteryx, QuickBooks, SQL, Python, Power BI
- Experience with data validation, financial reconciliation, AI-assisted development, and automation
- Member of Phi Eta Sigma National Honor Society and Delta Alpha Pi International Honor Society
- Sourdough baking enthusiast and card/board game aficionado