







# HELENA BROCKWELL

CPA with six years spanning Big Four assurance and SaaS industry accounting. Owns close, technical memos, and SOX walkthroughs, with recent experience standing up new processes after a Series C raise.

## CONTACT INFORMATION

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-  Salt Lake City, UT

## EDUCATION

M.Acc. University of Utah  
May 2018

B.S. in Accounting University of Utah  
May 2017

CPA, Utah (Licensed 2020)

## KEY SKILLS

- NetSuite, FloQast, Carta, Stripe revenue reporting
- ASC 606, ASC 842, ASC 718 stock comp
- SOX walkthroughs and control design
- Audit liaison, technical memo drafting
- Excel power user, SQL (basic)

## PROFESSIONAL EXPERIENCE

SENIOR ACCOUNTANT I QUARTERGLASS SOFTWARE, SALT LAKE CITY, UT  
OCTOBER 2022 – PRESENT

- Close the books for a \$28.4M ARR SaaS business in 5 business days, down from 9 when I joined
- Built the ASC 606 revenue policy and bookings-to-revenue waterfall now used by FP&A for forecasting
- Reviewed staff accountant work on AR, AP, and prepaid schedules; mentored two new hires through their first close
- Partnered with external auditors on the first PCAOB-style review post-Series C, no material adjustments
- Implemented FloQast for reconciliations, reducing missing sign-offs from roughly a quarter of accounts to under 5%

AUDIT SENIOR I MARSTON & HALE LLP, DENVER, CO  
AUGUST 2022 – SEPTEMBER 2022

- Led fieldwork on five public and three private engagements in tech and healthcare
- Drafted ASC 842 transition memos for three clients adopting in the same fiscal year
- Reviewed control walkthroughs and test-of-controls workpapers for a SOX accelerated filer

AUDIT ASSOCIATE I MARSTON & HALE LLP, DENVER, CO  
JUNE 2018 – JULY 2022

- Executed substantive testing across revenue, cash, and inventory cycles
- Built and maintained client lead schedules in CaseWare
- Promoted to senior six months ahead of standard track