



Untapped Potential Inc.

*Dana K, Candidate for:
Finance or Legal Position*

SUMMARY

Desire to apply legal education along with extensive working expertise in Legal and Financial Management positions.

EDUCATION

- Juris Doctor** | Admitted to CT Bar
UCONN SCHOOL OF LAW

Executive Editor, CT Journal of International Law
Mediation Clinic – Landlord/Tenant, Child Custody Disputes
- Bachelor of Science** | Finance, magna cum laude
BOSTON COLLEGE

BOARD WORK

- Canton Board of Education** **Vice-Chair, '14 and '16**
Served as Chair of the Finance & Facilities Subcommittee, responsible for development of annual operating and capital budgets of approximately \$25 Million.

Served as Chair of the Policy Subcommittee, responsible for drafting, reviewing and revising polices to ensure compliance with state and federal regulations.
Served as member of Negotiations and Curriculum Subcommittees.
- Cherry Brook Primary School PTO** **Treasurer**
Developed annual budgets, managed funds, drafted PTO Bylaws, prepared Form 1023 to obtain 501(c)(3) tax-exempt status, and filed Form 990s.

SKILLS

- Critical Thinking
- Planning and Organizing
- Communication
- Tactical (Results Oriented)
- Technology

WORK EXPERIENCE

WHITTON & COMPANY, LLC **Tax Consultant**
 Researched tax law to assist clients with Internal Revenue Service (“IRS”) investigations and audits. Prepared tax returns for individuals, partnership and trusts, as well as governmental filings, including Form 5500.

CIGNA RETIREMENT & INVESTMENT SVCS **Counsel**
 Provided legal services and advice to clients on Employee Retirement Income Security Act of 1974 (“ERISA”) and Internal Revenue Code (“IRC”) compliance and related issues. Collaborated with senior counsel to prepare a comprehensive analysis of pension reform legislation.

Researched and formulated solutions to technical issues including prohibited transactions, fiduciary rules and ERISA regulations.

Supported the Corporate Secretary by developing an ERISA regulations training module that was used in a Financial Development program project.

Negotiated with the National Office of the Department of Labor (“DOL”) on issues related to ERISA violations.

ARTHUR ANDERSEN, LLP **Manager**
 Assisted clients in restructuring benefit programs, including plan mergers and terminations.

Reviewed benefit plan documents, amendments, adoption agreements, summary plan descriptions and government filings for compliance with ERISA and IRC requirements. Planned and coordinated the reviews of over 125 benefit plans annually with the audit division and assisted clients with IRS and DOL investigations.

Developed and implemented various equity based compensation arrangements, including ISO plans, NQDC plans and phantom stock arrangements.

RISCASSI & DAVIS, P.C. **Law Clerk**
SILVER, WEBB, SWEENEY & GRIFFIN **Law Clerk**
CRANMORE, FITZGERALD & MEANEY **Legal Assistant**