

IRISH ANGEL F. BERNALES

BOOKKEEPER | TAX SUPPORT

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Detail-oriented Financial Management graduate with experience in customer service, banking, tax support, and bookkeeping. Skilled in QuickBooks Online, Xero, TaxDome, and Drake Tax Software, with hands-on experience in full-cycle bookkeeping, bank reconciliations, and financial record management. Committed to accuracy, continuous learning, and delivering quality results. Quick to adapt to new systems and processes, with strong analytical and problem-solving skills. Eager to contribute to a dynamic team while continuously expanding my expertise in U.S. bookkeeping and tax preparation.

CORE COMPETENCIES

Data Entry & Database Management
High-Volume Record Processing
Document Management &
File Organization

Data Validation & Accuracy Checks
Administrative Workflow Support
CRM & Data Systems

Confidential Data Handling
Multi-Platform Data Coordination
Error Detection & Data Reconciliation
Spreadsheet Management

SYSTEMS & TOOLS: Gladly CRM, Hibbert CRM, TaxDome, Drake Tax Software, Trello, Microsoft Office (Excel, Word), Google Docs & Google Sheets & IRS Solutions

PROFESSIONAL EXPERIENCE

Bookkeeper Trainee | Social Media Manager, Borderless Accountants

June 2026 – Present

- Completed hands-on training in U.S. Bookkeeping and QuickBooks Online (QBO), applying accounting principles to real-world business scenarios while providing one-on-one support to fellow trainees with QBO tasks and bookkeeping processes.
- Managed a full-year bookkeeping cycle by accurately recording transactions, maintaining the chart of accounts, and completing 12 monthly bank reconciliations with zero discrepancies.
- Verified and validated financial records before system entry to prevent data discrepancies and errors.
- Prepared and analyzed key financial reports, including the Profit & Loss, Balance Sheet, Trial Balance, and General Ledger, to support financial review and decision-making.
- Maintained accurate financial records while ensuring compliance with bookkeeping best practices and data accuracy.
- Managed the company's Facebook page by creating engaging content, responding to inquiries, and assisting prospective students with course information and enrollment.

Data Entry Clerk | Tax Support, Tax Medics ER

Feb - March 2026

- Processed and entered high-volume tax documentation (W-2, 1099, 1098, P&L statements) into Drake Tax software while maintaining 100% data accuracy.
- Organized and labeled client documents in TaxDome, ensuring secure file management and easy retrieval for internal teams.
- Verified and validated financial records before system entry to prevent data discrepancies and errors.
- Updated project workflows and client data in Trello, improving task tracking and operational visibility.
- Retrieved tax transcripts from IRS.gov and uploaded POA and Form 8821 documentation

On-the-Job Trainee, Philippine National Bank

Aug 2025 - Oct 2025

- Assisted with banking transactions, account inquiries, and account openings, supporting daily branch operations.
- Verified cheques and financial documents, validating signatures, amounts, and client information to prevent fraud and errors.
- Audited BIR tax forms (1701A, 1701Q, 2551Q, 1706, 2000-OT) before submission to ensure completeness and accuracy.

Customer Service Representative, TaskUs, Inc. - Bohol

Jun 2023 - Aug 2025

- Managed high-volume customer and patient account records for an ophthalmology clinic through email, chat, SMS, and phone using Gladly CRM, ensuring accurate data entry, record updates, and timely documentation.
- Entered and verified eyeglasses prescriptions, orders, billing details, and transactions with strict attention to accuracy.
- Processed payments, refunds, and billing adjustments while maintaining compliance with company policies.
- Validated customer accounts and conducted order verification and credit checks using Hibbert CRM.
- Resolved billing discrepancies and maintained accurate customer documentation within CRM systems.

EDUCATION

Bachelor of Science in Business Management major in Financial Management

Jun 2020 - Dec 2025

Holy Name University

Accountancy and Business Management (Senior High School)

Jun 2018 - Mar 2020

Holy Name University

ADDITIONAL INFORMATION

- Certifications:** Civil Service Commission - Professional Eligibility, QuickBooks Online Certification Level 1, Xero Certified Associate Level 1 & Xero Certified Professional Level 2, Certified Financial Management Specialist
- References:** Available upon request