

CURRICULUM VITAE

JOANNA MURRAY

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PROFESSIONAL TRAINING – A.C.A.

Modules sat between September 2003 and November 2005

First time passes 9/10 – given exceptional circumstances for failure due to illness

All training given by FTC (Now Kaplan)

UNIVERSITY EDUCATION

Bristol University (September 2000 – July 2003)

Equine Science BSc Hons 2:1

Course modules included: Anatomy, Physiology, Biochemistry, Mathematics, Biomechanics, Forensics, Immunology

SECONDARY EDUCATION

Truro School / Truro College, A Levels: Mathematics: A, Chemistry: A, Biology: B. GCSEs: 3 A*'s, 4 A's and 2 B's

EMPLOYMENT HISTORY

PRICEWATERHOUSECOOPERS READING

October 2003 to January 2004

Accountancy Trainee

Agriculture and Bloodstock Section

In January 2004 the Section was sold to James Cowper in Newbury and staff were given the option to transfer.

JAMES COWPER NEWBURY, BERKSHIRE

January 2004 to September 2006

Accountancy and Audit Senior

Bloodstock Group

Rural Business Services

Personal Client Base: Small to large owner managed businesses primarily

Turnover range: £50k – £20m

Industry sectors: Primarily equine industry and rural businesses

Primary Responsibilities (examples would include)

- Preparation of accounts (Ltd companies, Groups, Partnerships, Sole traders)
- Preparation of corporation tax computations for review by tax manager
- Planning audits using Proaudit
- Audit fieldwork – all aspects
- Liaising with clients on a wide range of issues and maintaining client relationships
- Reporting direct to client (management/board of directors)
- Management accounting function for some of our larger audit clients

Key Achievements:

Completion of training to **ACA QUALIFIED STATUS**

In September 2006 my husband started a PGCE at Bath University and hence we relocated to the South West.



KAPLAN FINANCIAL BRISTOL

September 2006 to December 2007

Accountancy tutor (Teaching ACA, ACCA and AAT students) in:

- Accounting
- Audit & Assurance
- Financial Reporting
- Financial Accounting
- Corporate and Business Law

Primary Responsibilities (examples would include)

- Teaching classes of 5 to 40 students
- Student feedback, reporting and script marking
- Mentor for key contract students
- Bristol and Cardiff office social coordinator

Key Achievements:

Swift development of teaching and presentation skills
Development of organisational skills and time management
Improvement of management skills and communication skills
Achieved pass rates of students of over 80% on all courses
Dramatically improved stamina and voice projection!

In December 2007 I made the decision to move to industry due to the increased travelling required of me (to Cardiff) and the desire to expand my knowledge of the bloodstock and racing industry.

HORSES FIRST RACING LTD WILTSHIRE

January 2008 to March 2010

Financial Controller for:

Horses First Racing Ltd
Equine Health Centre Ltd
Chittenden Factory
Red Eight Consulting Ltd

Primary Responsibilities (examples would include)

- Full responsibility for business finance, including management accounts, shareholder liaison and audit files
- Signatory for all business bank accounts
- Personnel manager at HFR, including staff management and payroll (Sage)
- Health and Safety coordinator
- Legal advisory capacity including employment, company and contract law issues
- Primarily responsible for HMRC, Companies House and UKBA matters.

Key Achievements:

Successful implementation of new systems, processes and controls to allow growth and development of companies
Successful business start-ups for Chittenden Factory and Red Eight Consulting Ltd
All four businesses now operating on Sage software, using online filing and running smoothly!

In March 2010 I was offered the position of Bloodstock Manager with Smith & Williamson LLP in Salisbury, working with my previous boss from PwC/James Cowper.



SMITH & WILLIAMSON LLP
SALISBURY, WILTSHIRE

March 2010 to March 2014

Bloodstock Manager

Bloodstock & Equine Team

Assurance & Business Services (ABS)

Client Portfolio: Approx 75 businesses, mainly owner managed, sole traders to multinational companies
Turnover range: £20k – £50m
Industry sectors: Primarily equine industry and associated rural businesses

Primary Responsibilities (examples would include)

- Management of ABS team of 22-24 (with 3 other managers)
- Direct responsibility for team of 6 juniors/seniors
- Primary client contact for my portfolio
- Review of accounts preparations (Ltd companies, Groups, Partnerships, Sole traders)
- Preparation of business plans, budgets, forecasts & cashflows, tender documents
- Business start-ups; advising and aiding new businesses in set up and structure
- Expert in Sage software – client set up, report design and problem solving
- Billing, WIP and debtor management
- Client engagement administration
- Company secretarial where necessary
- Management accounting function for some clients where required

Key Achievements:

Setup, recruitment and development of Bloodstock Team from scratch (with Director)

MODUS award for client service in November 2010

National ABS strategy representative for Salisbury office

Rated 'Exceeds Expectations' consistently at every annual appraisal

Assessed as 'Growing Talent' as part of a recent Tax & Business Services (TBS) Talent Programme; one of only 34 members of staff nationally out of over 200 employees.

In December 2013 after the birth of our second daughter, I decided to set up in practice on my own in order to preserve my work-life balance with two small children.

Free Range Business Services Limited commenced trading on 1st April 2014 and, within the same year my husband and I built a café in our local park. Collett Park Café Limited commenced trading on 15th August 2014.

Both businesses are still going strong 4 years on – we now have 3 children and some wonderful staff who help us juggle that precious work-life balance on a daily basis! I am also still tutoring on a few occasions each year on a freelance basis with First Intuition, Bristol, teaching primarily Corporate & Business Law (ACA/ACCA/CIMA).

FREE RANGE BUSINESS SERVICES LIMITED
SHEPTON MALLET, SOMERSET

1st April 2014 to present

Managing Director & Owner

Equestrian & Agricultural Team

www.freerangebusiness.co.uk



COLLETT PARK CAFE LIMITED SHEPTON MALLET, SOMERSET

1st August 2014 to present

Managing Director & Joint Owner

Local family-run café in the heart of Shepton Mallet

www.colletparkcafe.com

ADDITIONAL INFORMATION

Hobbies

Running, riding (own horses), swimming, hockey, music, gardening

Sporting achievements

- Selected for Cornwall County Hockey, Swimming and Athletics teams – secondary school
- Member of Fourburrow Hunt Pony Club for 13 years and represented the club in junior and senior teams in tetrathlon, dressage, show jumping and eventing, reaching the National finals for dressage and show jumping in 1998.
- Pony Club to 'B Test' which allows me to teach
- Competed British Eventing up to one star/intermediate level
- Competed in National Triathlon Championships 3 years running – finished 7th individually in 1996 and the team was 3rd.

Travel

During my gap year (1999/2000) I travelled to Singapore, Bali, Australia, New Zealand, Cook Islands. Fiji and America

Also

Full clean driving licence and LGV licence

Fully literate in: Microsoft Word, Powerpoint and Excel; Caseware and Caseview; Sage accounts and Sage Payroll; Key Accounts (Exchequer), Yardman, Star Payroll and Frontrunner. Basic knowledge of many other accounting & payroll software, eg Quickbooks, Farmplan & Key Prime.

Jo Murray

25/02/18

