

Kate Wagner

(617) 838-1090 | katejwagner10@gmail.com | Raynham, MA | LinkedIn: [Kate Wagner](#)

EDUCATION

The University of Scranton, Kania School of Management

Scranton, PA

Bachelor of Science

May 2028

Double Major: Finance & Accounting

GPA: 3.75/4.00

Awards & Activities: Dean's List (*All Semesters*), Merit-based Loyola & Jack D. Ramaley Scholarships, Beta Alpha Psi, Omega Beta Sigma, Kania Women in Business, Women's Rowing Team, Neurodiversity Inclusion Association

Related Courses: Intermediate Finance, Federal Taxes, Accounting Information Systems, Financial Accounting, Intermediate Accounting, Statistics, Business Analytics, Economics (Micro & Macro), Operations & Information Management

WORK EXPERIENCE

NeuroSync

Holliston, MA

Accounting Intern

May 2026 – Present

- Generate 40+ weekly superbills and invoices with accurate diagnosis codes across PIP, cash, and standard funding channels, coordinating submissions with 4 funding companies to drive \$100,000+ in patient billing collections in June alone, and maintaining end-to-end Salesforce billing records throughout the patient lifecycle
- Manage monthly provider payment obligations (totaling \$45,300 in May and \$65,275 in June) across 20 medical providers and 48 testers by calculating compensation per test using individualized rate structures across 3 test types for 600+ patient tests, maintaining a segmented payment ledger to ensure accurate and timely disbursement
- Lead A/R collections outreach to 10+ personal injury law firms to obtain claim numbers and adjuster information critical to PIP billing, managing follow-up pipelines for 3 non-responsive firms, and tracking all correspondence in a structured log
- Build and maintain daily Excel dashboards tracking referrals and patient tests for 5 regional sales reps across 7 service categories, automating formula-driven totals from Salesforce data to deliver real-time production visibility to management
- Ensure audit-ready data integrity across the patient billing pipeline by reconciling Salesforce session records, resolving missing fields, and validating all patient information prior to funding submission across 4 funding channels

David Cleary, CPA

Stoughton, MA

Tax Administrative Assistant

February 2024 – January 2026

- Supported the tax preparation process for hundreds of individual and corporate clients, reviewing and reconciling source documents including W-2s, 1099s, K-1s, P&L statements, balance sheets, and depreciation schedules to ensure accuracy and completeness prior to filing
- Leveraged SurePrep tax automation software to verify and validate client data across preparation workflows, strengthening quality control standards and reducing manual review time
- Spearheaded firm-wide paper-to-digital conversion of corporate client files, digitizing thousands of documents to eliminate duplicate records, improving retrieval speed, and establishing a scalable, audit-ready filing system

PROFESSIONAL DEVELOPMENT & LEADERSHIP

Discover Protiviti

New York, NY

Selected Participant

April 2026

- Selected through a competitive 3-round interview process, including a case study interview, to attend an exclusive Protiviti recruiting event, networking directly with consultants and senior staff
- Collaborated with a team to complete a live business case study, presenting findings to Protiviti professionals, and shadowed a first-year consultant in the Internal Audit & Financial Advisory practice to gain hands-on insight into client-facing consulting work

University of Scranton Women's Rowing Team

Scranton, PA

Student-Athlete & Director of Communications

September 2024-Present

- Compete as a student-athlete on a collegiate crew team, demonstrating coachability, discipline, and time management through early morning lake practices and 1-2 intercollegiate regattas per semester alongside academic and professional commitments
- Produce and manage all team digital content across Instagram and TikTok, including regatta lineup graphics, post-event recaps, race-day photo and video coverage, and senior spotlight features to drive team engagement and recruitment

SKILLS & INTERESTS

Skills: MS Office, Power BI, Salesforce, QuickBooks, SurePrep Tax Automation Software, Python (Google Colab)

Interests: Rowing, Softball Umpire, Distance Running, Boston Celtics, Soccer Coach, Daily Duolingo (Spanish)