

KATE YORK

VIRTUAL BOOKKEEPER & ASSISTANT

www.justbeachyva.com
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805-888-7035



Beyond the numbers - Bookkeeping Services Online & Offline

ACCOUNTING SERVICES OFFERED

- Bookkeeping
- Invoicing
- AR/AP Management
- Property Management Accounting
- 1099s
- Sales Tax
- Required State Filings

ORGANIZATIONAL & ADMIN SERVICES OFFERED

- Property Management
- Calendar Management
- Appointment Scheduling
- Dropbox/Google/One Drive Organization
- Email Inbox Management
- Create & Manage Spreadsheets
- Prepare PowerPoint Presentations
- Edit & Proofread
- Data Entry in MS Office/Google Docs

SOFTWARE

- AppFolio
- Canva
- Google Suite
- GoToMyPC
- LiveRez/LiveTrust
- MS Office Suite
- QuickBooks Desktop/Online-Certified ProAdvisor
- Quicken
- Webex
- Zoom

ABOUT ME

I am a California native and have been proud to call the Central Coast my home for the past seven years. My co-workers are my two rescue dogs, Faith and Buddy. My favorite pastimes include paddleboarding, hiking, dancing, and walking my dogs with friends.

EDUCATION

CSU Sacramento, B.S. Criminal Justice

TESTIMONIALS

Kate has been my bookkeeper and assistant for over three years now. She set up a new accounting system and implemented it with ease. She was able to automate all of our accounts and update our processes to include QuickBooks Online. Kate completed a digital filing project that consolidated 20 years of records. Besides accounting work, she assists with customer accounts and also manages a customer support inbox for my company. Having her as a virtual assistant has given me the time to pursue new clients since she streamlined our accounting procedures.

Stewart Morse
President, OPEN-LINE

Kate has been my contracted office manager and bookkeeper for over 12 years and has proven to be highly organized and efficient. She implemented invoicing procedures that alleviated past customer payment issues. She is currently helping me update legal documents across 7 states and is working with me to improve all my processes. I'm so glad to have her on my team!

Deanna Bowa
President, Superior Corporate Housing, Inc.

VOLUNTEERISM

Currently, I am serving as Co-Treasurer for Arroyo Grande High School Band Boosters. This includes filing annual non-profit paperwork, monthly bank reconciliations, and annual tax preparation.