

Sophie Barton

Trainee Accountant

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Accounting and Finance graduate from the University of Plymouth with a **2:1 degree (65% average)** and hands on experience from a summer placement at a regional accountancy practice. Processed over **300 client transactions** during placement and achieved a **98.5% accuracy rate** on reconciliations. Currently studying for the **AAT Level 4 Professional Diploma** while supporting a local business with part time bookkeeping. Methodical and reliable, with a strong foundation in tax compliance and management accounting.

EXPERIENCE

Accounts Assistant (Summer Placement), PKF Francis Clark, Plymouth

Jun 2025 – Aug 2025

Completed a 12 week summer placement with the general practice team, supporting accountants with year end accounts and tax returns for SME clients.

- Prepared year end accounts for **6 sole traders and 3 limited companies** with combined turnover of **£4.2 million**
- Processed **300+ transactions** across Xero and QuickBooks, maintaining a **98.5% accuracy rate** on all reconciliations
- Drafted **9 self-assessment tax returns** and assisted with **4 corporation tax computations** under supervision
- Responded to **25+ client queries** per week via email and phone, reducing the senior team's admin workload by approximately **15%**

Bookkeeper (Part-Time), The Harbour Cafe, Plymouth

Sep 2024 – May 2025

Managed all bookkeeping responsibilities for an independent cafe with annual revenue of approximately £180,000.

- Recorded an average of **85 purchase invoices and receipts per month** using QuickBooks Online
- Prepared and submitted **4 quarterly VAT returns** on time with zero errors, recovering **£6,200** in input VAT over the year
- Reconciled the business bank account weekly and flagged **3 instances** of duplicate supplier payments totalling **£1,400**

EDUCATION

BSc (Hons) Accounting and Finance in Accounting and Finance, University of Plymouth, Plymouth

Sep 2022 – Jul 2025

Graduated with Upper Second Class Honours (**65% average**). Dissertation on the impact of Making Tax Digital on compliance costs for UK micro businesses, graded **68%**.

- Relevant modules: Financial Accounting, Management Accounting, Taxation, Auditing, Corporate Finance, Business Statistics
- Received the **Plymouth Business School Prize** for highest mark in the Taxation module (**78%**)
- Completed **AAT Levels 2 and 3** as part of the integrated degree programme

SKILLS

Financial Accounting (UK GAAP), Tax Compliance (Self-Assessment & Corporation Tax), Microsoft Excel (Pivot Tables, VLOOKUP, IF Statements), QuickBooks Online, Xero, Sage 50, Bank Reconciliation, VAT Returns, Payroll Processing, Management Accounts, Attention to Detail, Client Communication

CERTIFICATIONS

AAT Level 3 Advanced Diploma in Accounting, Association of Accounting Technicians *Sep 2023 – Jun 2024*

AAT Level 4 Professional Diploma (In Progress), Association of Accounting Technicians *Sep 2025 – Jun 2026*

LANGUAGES

English - Native

PROJECTS

Treasurer - Plymouth University Accounting Society *Sep 2024 – Jun 2025*

Managed the society's finances and organised employer networking events throughout the academic year.

- Oversaw an annual budget of **£2,800** covering speaker events, socials, and a careers fair
- Organised **6 employer talks** with firms including BDO, Grant Thornton, and Bishop Fleming, attracting **40+ students** per event on average
- Maintained financial records and submitted quarterly reports to the Students' Union finance committee

ICAEW BASE Competition Regional Finalist *Jan 2025 – Mar 2025*

Competed in the ICAEW Business and Accounting Skills Experience with a team of **4 students**.

- Analysed a fictional company's financial statements and prepared recommendations for a board presentation
- Reached the **regional finals**, placing in the **top 8 out of 32 university teams** from the South West
- Received feedback from judges praising the group's **cash flow forecasting accuracy** and presentation style

REFERENCES

Claire Jessop, Senior Accountant, PKF Francis Clark, claire.jessop@pkf-francisclark.co.uk, +44 7700 900 412

EXTRA CURRICULAR ACTIVITY

Volunteer Tax Preparer - Plymouth Citizens Advice *Jan 2025 – Apr 2025*

Assisted low income residents with self-assessment tax returns during the January filing deadline period.

- Helped **18 individuals** complete and file their returns on time, with **zero corrections required** from HMRC
- Explained tax obligations in plain English and identified **£3,100** in unclaimed allowances across all clients

Course Representative - BSc Accounting and Finance *Sep 2023 – Jun 2025*

Represented **120 students** in departmental meetings and communicated feedback to teaching staff.

- Raised concerns about assessment scheduling that led to a **revised exam timetable** benefiting the entire cohort
- Organised **3 student feedback sessions** per semester to gather input before Staff-Student Liaison Committee meetings

Parkrun Volunteer - Plymouth Hoe Parkrun *Jun 2023 – Jun 2025*

Regular volunteer at the weekly 5k event, rotating through marshal, timekeeper, and results processing roles.

- Volunteered at **35+ events** over two years, helping manage runs with an average of **180 participants**