

## **Katelyn E. Swasey**

Ms. Swasey is an Associate at Rocky Mountain Advisory, LLC. Previously, she worked as an Audit Intern at BDO. Prior to that, she worked as a Graduate Assistant for the School of Accountancy at Idaho State University. She also has experience in corporate accounting as an Accounting Clerk. Ms. Swasey holds a Master of Accountancy and Master of Business Administration from Idaho State University and is working to complete the CPA Exam.



### ***Employment History***

---

July 2022 to Present	Rocky Mountain Advisory, LLC Salt Lake City, UT Associate
June 2022 to July 2022	BDO USA, LLP Salt Lake City, UT Audit Intern
August 2021 to May 2022	Idaho State University Pocatello, ID Graduate Assistant
May 2019 to May 2021	Collective Medical Technologies, Inc. Cottonwood Heights, UT Accounting Clerk

### ***Education***

---

Idaho State University, Pocatello, Idaho  
Master of Accountancy, 2022  
Master of Business Administration, 2022

Utah State University, Logan, Utah  
BS Accounting, 2020  
Criminal Justice Minor, 2020  
Anticipatory Intelligence Minor, 2020

### ***Professional Memberships***

---

Association of Certified Fraud Examiners

## *Professional Experience*

---

<b>Tax</b>	<p>Experienced in preparation of income tax returns for Corporations S-Corporations, Partnerships, Trusts, Non-Profits, and Individuals.</p> <p>Experienced in preparation of tax returns for taxpayers in Chapter 7 and Chapter 11 Bankruptcy.</p>
<b>Fraud Investigations</b>	<p>Assisted in a fraud investigation identifying misappropriated client funds through analyzing bank accounts and tracing inflows and outflows of cash. Prepared schedules outlining suspected fraud for use in court.</p>
<b>Litigation support</b>	<p>Assisted in divorce cases tracing cash, valuing marital assets, and preparing marital estate splits for equitable division.</p> <p>Assisted in the legal process through preparation of deposition questions and subpoena requests for counsel.</p> <p>Analyzed related party transactions through creating amortization schedules, tracing deposits and payments in the bank account and ensuring compliance with agreed-upon terms.</p>

## *References*

---

Available upon request

**Contact Katelyn Swasey at:**  
Rocky Mountain Advisory, LLC  
15 West South Temple, Suite 500  
Salt Lake City, UT 84111  
Direct Dial: 801.428.1628  
Main Office: 801.428.1600  
[kswasey@rockymountainadvisory.com](mailto:kswasey@rockymountainadvisory.com)