



Christian Angelo R. Lazon

Executive Assistant | Bookkeeper | Payroll Admin Support

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QuickBooks Online ProAdvisor Certified Bookkeeper with experience supporting U.S.-based businesses in accounts payable, accounts receivable, invoicing, payment tracking, financial documentation, and operational support.

Proficient in QuickBooks Online, ServiceTitan, Monday.com, ClickUp, Microsoft 365, and Google Workspace. Recognized for maintaining organized financial records, improving workflows, and supporting efficient business operations.

EDUCATIONAL ATTAINMENT:

- College Graduate
 - University of the Philippines
 - Bachelor of Science in Medical Technology
 - 2019 - 2023
- Senior High School Graduate
 - APEC Schools Dasmariñas
 - 2016 - 2019

PROFESSIONAL HIGHLIGHTS

- QuickBooks Online ProAdvisor Certified
- 5+ Years Supporting U.S.-Based Businesses
- Accounts Payable & Accounts Receivable
- Payroll Support (ADP Run)
- ServiceTitan | Monday.com | ClickUp
- Executive Operations & Process Improvement
- CRM Management & Workflow Documentation

CERTIFICATIONS:

- Quickbooks Online ProAdvisor Certified (Renewed 2026)

Tools Proficiency | Skills

- Accounting & Finance**
 - QuickBooks Online
 - ADP Run | Bill.com | Ramp
 - Xero
- CRM & Operations**
 - ServiceTitan | Salesforce
 - GoHighLevel | Monday.com
 - ClickUp | Zendesk | DASH
- Productivity & Collaboration**
 - Google Workspace | Microsoft 365 | Microsoft Excel | Google Sheets | Notion
- Creative Tools**
 - Canva | CapCut

Core Competencies:

- Accounts Payable (AP)
- Accounts Receivable (AR)
- Bank Reconciliation
- Invoice Processing
- Payroll Support
- Financial Reporting
- CRM Management
- Workflow Documentation
- Vendor Coordination
- Process Improvement
- HVAC Job Project

PROFESSIONAL EXPERIENCE:

Houzpital Property Damage & Restoration

U.S Direct Executive Assistant | Bookkeeper (QBO) March 2025 to September 2026

Tools:

- QuickBooks Online | Monday.com | ClickUp | Google Workspace | Microsoft 365 | ServiceTitan | DASH

Key Responsibilities

- Supported** day-to-day bookkeeping using QuickBooks Online, including invoice creation, expense tracking, payment monitoring, and financial record maintenance.
- Assisted** with Accounts Payable and Accounts Receivable by monitoring due invoices and vendor payments.
- Used** Monday.com for project management, task tracking, deadline monitoring, and workflow coordination before the team transitioned to ClickUp.
- Managed** executive calendars, task priorities, documentation, and operational workflows.
- Maintained** organized financial and operational records to support business reporting.
- Supported** an HVAC and property damage restoration client using ServiceTitan and DASH to track service calls, job estimates, invoices, job costing details, project updates, and customer records.

The Numbers Cafe

U.S Direct Executive Assistant | Bookkeeper (QBO) March 2024 to February 2025

Tools:

- QuickBooks Online | ServiceTitan | Google Workspace | Microsoft Office

Key Responsibilities

- Managed** Accounts Payable and Accounts Receivable through QuickBooks Online.
- Prepared** invoices, tracked customer payments, and supported account reconciliations.
- Processed** vendor payments and maintained accurate financial documentation.
- Used** ServiceTitan to manage customer records, estimates, invoices, scheduling, dispatch coordination, and project tracking.
- Assisted** with payroll processing through ADP Run and maintained supporting financial documentation.
- Maintained** CRM records and ensured customer and financial information remained accurate.
- Used** ServiceTitan to manage high-volume HVAC transactions, including job estimates, job costing, customer invoices, service records, and subscription upgrades from regular to premium plans.
- Managed** multiple HVAC projects from setup through completion, keeping customer accounts, financial records, project notes, and executive updates accurate and organized.

Ttec

Loan Officer / Chat Associate II (SoFi)

July 2023 to February 2024

Key Responsibilities

- Assisted** customers with Personal Loans, Student Loan Refinancing, Checking, and Savings accounts, including application status, loan inquiries, documentation requirements, and account concerns.
- Handled** sensitive financial information professionally while following verification, compliance, privacy, and customer protection procedures.
- Promoted** to Team Leader of SMEs and later Assistant Trainer, supporting new hires with product knowledge, call/chat handling, process understanding, and performance readiness.

Concentrix

Quickbooks Specialist CSR & TSR (1 year & 4 months)

January 2021 to May 2023

Key Responsibilities

- Assisted** QuickBooks Online customers with account navigation and product support.
- Guided** users through billing concerns, subscriptions, company setup, and account configuration.
- Troubleshooted** software issues while ensuring a positive customer experience.
- Escalated** complex technical and accounting-related concerns when appropriate.

Customer Care Representative (UnitedHealthcare)

Key Responsibilities

- Assisted** members with benefits, claims, eligibility, coverage, and provider inquiries.
- Coordinated** healthcare information while maintaining HIPAA compliance.
- Resolved** complex customer concerns with professionalism and empathy.
- Maintained** accurate documentation and account records.

IGT Solutions

Travel Associate (Agoda/TURO)

March 2019 to December 2020

Key Responsibilities

- Provided** customer support for travel, booking, and customer experience accounts, including Agoda reservations and Turo-related customer service concerns.
- Assisted** customers with booking changes, hotel availability checks, cancellations, refunds, reservation issues, account concerns, and general service inquiries.
- Coordinated** with hotels, partners, and internal teams to confirm room availability, resolve booking discrepancies, and ensure smooth customer experiences.