



# LOGAN MONTGOMERY

## Accounting Assistant

Logan Montgomery  
[LoganM@CPN-Legal.com](mailto:LoganM@CPN-Legal.com)  
513-898-9827

### Education:

University of Cincinnati,  
Business Administration, Marketing  
& Business Economics

### Fun Fact:

Logan joins CPN Legal excited to provide extraordinary service to our clients. His prior roles in customer service & client management built the perfect foundation to assist our clients their books. Logan excels at creating processes for clients, managing client databases and keeping QuickBooks up to date.

Logan understands the importance of tailoring a process to match the client's workflow. His detailed orientated mindset means that clients are in great hands to receive accurate and timely financial data.

### Areas of Expertise

Bank  
Reconciliation

QuickBooks Online  
Setup

Excel &  
Reporting

Clio Setup &  
Integration

### Professional Summary

- Customer Service Account Specialist: Total Quality Logistics
- Logistics Coordinator: Total Quality Logistics
- Peer Tutor: University of Cincinnati Learning Commons
- Accounting Intern: UMC Food Ministry

### Meet CPN Legal

CPN Legal is a team of expert accountants exclusively dedicated to helping lawyers succeed in business. We help you better understand your cash flow, streamline your invoicing process, and help you get paid – all while managing the day-to-day bookkeeping needs of your firm. We are certified partners and advisors for Clio and QuickBooks.



[www.CPN-Legal.com](http://www.CPN-Legal.com)



Gold  
CERTIFIED  
PARTNER

