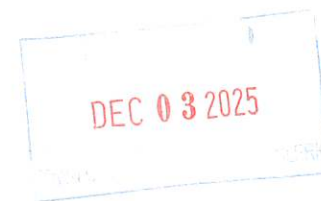


JoAnna Phillips

341 School House Rd.
New Lebanon, NY 12125
518-794-3056



Professional Summary

Meticulous administrative professionals with substantial HR experiences including personnel file management, onboarding preparation, compliance documentation, benefits coordination, and employee support. Complemented by a strong business operations background spanning executive assistance, bookkeeping, office management, and cross-department communication. Known for maintaining confidentiality and improving workflow efficiency in demanding environments.

Core Competencies

- Human Resources Administration
- Personnel File & Compliance Management
- Onboarding & Employee Relations
- Workers' Compensation & Benefits Coordination
- Policy & Procedure Development
- Conflict Documentation & Resolution Support
- Payroll Support & Garnishments
- Confidential Reporting & Recordkeeping
- Executive-Level Administrative Support
- Business Operations & Office Management
- Accounts Payable/Receivable & Financial Reporting
- Staff Training & Communication
- Project Management
- Budget Forecasting

Human Resources Experience

- Maintained confidential employee files, including DOT-compliant documentation.
- Conducted onboarding processes including employment forms, benefits enrollment, and orientation materials.
- Created and maintained HR policies and employee handbook.
- Coordinated disciplinary documentation, conflict reporting, and resolution support.
- Managed workers' compensation claims and return-to-work documentation.
- Performed background checks, credential verification, and annual review documentation.
- Supported payroll functions including garnishments, expense auditing, and employee verification.

Professional Experience

Brockman Real Estate — Great Barrington, MA (2016–2022)

- Licensed Real Estate Broker & Real Estate Assistant supporting full-cycle real estate transactions.
- Represented buyers and sellers in regulated real estate processes, maintaining active broker licensure.
- Prepared Comparative Market Analyses (CMAs), negotiated terms, and guided clients through closing.
- Created high-quality floor plans to enhance listings and support property marketing strategies.
- Coordinated showings, inspections, appraisals, and communications between attorneys, lenders, and agents.
- Prepared contracts, disclosures, listing packets, MLS entries, and compliance documentation.
- Managed scheduling, client communications, and listing preparation for active properties.
- Professional photography and editing.

Portnoy Advisors — Alford, MA (2014–2016)

- Accounts Payable, Accounts Receivable, deposits, reconciliations, and monthly financial reporting.
- Created 1-year, 2-year, and 3-year budget forecasts to support executive-level financial planning.
- Coordinated project management activities, including scheduling, deliverables tracking, and documentation.
- Prepared travel itineraries and managed complex coordination for executive leadership.
- Drafted correspondence, maintained calendars, and supported time-sensitive administrative tasks.
- Coordinated event planning, vendor communication, and confidential household/business operations.

REM Management Group — Rensselaer, NY

- Managed vendor relationships, contract development, material creation, and startup operational planning.
- Supported corporate relocation contracts, including coordination with employers, employees, and third-party vendors.
- Maintained active status as a Licensed NY Real Estate Broker while supporting relocation transactions.
- Oversaw A/R, A/P, deposits, collections, financial audits, and QuickBooks system conversion.
- Reviewed home appraisals, collaborated with realtors on marketing strategy, and assisted homeowners with negotiation.
- Coordinated travel (air, rail, car, housing) and managed employee expense auditing and year-end tax documentation.
- Supported household goods coordination including vendor selection, estimate review, and invoice auditing.

Mabey's Moving & Storage, Inc. — Rensselaer, NY (1987–2012)

- Executive Assistant supporting President and Vice President with scheduling, proposals, presentations, statistical reporting, research, and confidential correspondence.
- HR duties including personnel file management, handbook creation, workers' compensation, background checks, benefit administration, disciplinary documentation, and annual reviews.
- Office Manager overseeing staff training, policy development, cross-department communication, operational efficiency, and workflow coordination.
- Accounting/Bookkeeping including A/P, A/R, deposits, collections, credit card processing, financial audits, and software conversion.
- Payroll processing including commissions, escrow ledgers, and driver expense auditing.
- Operations management for 45+ employees including scheduling, warehouse oversight, DOT compliance, and drug/alcohol testing procedures.
- Marketing & Business Development include proposals, brochures, advertising materials, and coordination with web and print vendors.

Education

New Lebanon Central High School — Business Major (1983)

References

Available upon request.



Town Clerk <townclerk@townofnewlebanon.com>

Letter of Interest/HR

1 message

JoAnna Phillips <joannalp@yahoo.com>

Wed, Dec 3, 2025 at 2:31 PM

To: Town Clerk <townclerk@townofnewlebanon.com>, "Town Supervisor (New Lebanon)" <supervisor@townofnewlebanon.com>, "C. Skerkis" <cskerkis@townofnewlebanon.com>, Joanne Amlaw <jamlaw@townofnewlebanon.com>, "S. Powers" <spowers@townofnewlebanon.com>, Scout Metzler <smetzler@townofnewlebanon.com>

To the New Lebanon Town Board and Town Clerk:

I am writing to express my interest in providing Human Resources Support Services for the Town of New Lebanon. I have more than twenty-five years of hands-on experience in HR administration, personnel file organization, onboarding, benefits coordination, compliance paperwork, and general office management. Much of my background involves exactly the type of detailed, confidential work that the position requires.

My career has always centered around keeping operations running smoothly making sure files are complete and accurate, supporting staff and leadership, improving organization, and handling day-to-day responsibilities that need to be done correctly and consistently. I am comfortable working independently, I learn systems quickly, and I am used to managing multiple responsibilities at once while maintaining accuracy and confidentiality.

I am attaching my résumé, which outlines my experience in HR, bookkeeping, executive support, operational oversight, and project coordination. These roles have given me a strong understanding of compliance, documentation standards, employee processes, and the type of structured recordkeeping that is important in a municipal setting.

I would welcome the opportunity to support the Town in this capacity and bring my organizational experience and work ethic to the role.

Thank you for your consideration. I look forward to discussing this further.

Kindest Regards,

JoAnna Phillips

 **2025 Updated Resume.docx**
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