

OBJECTIVE:

To obtain a senior level leadership position in the accounting and finance area that offers me the opportunity to actively apply the technical and leadership skills developed during my 28-year career in public accounting. To bring my in depth knowledge of accounting, taxation, financial management and strategic planning to a highly motivated team and contribute to their growth and success.

PROFILE:

28 years of combined accounting, tax and management experience, including responsibilities for the Boca Raton office of McClintock Accounting, Inc, the 16th largest public accounting and professional firm in the US. Masters in Management, with a tax specialization along with technical expertise in:

Taxation:

- International
- Corporate
- S Corporation and Pass-through Entities
- Individual
- Estate and Gift
- Multi-State
- Research
- Planning and Structuring

Accounting, Attest & Consulting:

- ♦ Compilation, Review and Audits
- ♦ Strategic financial modeling & planning
- ♦ Internal control review & design
- ♦ Due diligence on purchase & sale transactions
- ♦ Succession planning

PROFESSIONAL EXPERIENCE:

McClintock Accounting

(16th largest accounting firm in the U.S.; see www.McClintock.com) (1980 – Present)

Director (2006 – Present)

Responsible for delivering tax and attest services to a diverse client base of over \$XM to companies and individuals in the construction, international trade, real estate, wholesale distribution, travel and professional service industries. Manage a staff of tax managers, supervisors, and seniors.

- Assisted clients with research and experimentation tax credit, obtaining tax savings of \$XXXX.
- Recommended and implemented the use of the interest charge domestic international sales corporation (IC-DISC) for export clients helping them defer millions of dollars in tax.
- Recommended like-kind exchange transactions for clients in the real estate and aircraft industries helping them defer millions of dollars in tax.
- Conducts quarterly financial performance reviews for clients helping them improve cash flow, profitability and net worth.

¹As regulated by the State of Florida

Director (1999 – 2005)

Participated in the integration of a local accounting firm (Jones, Smith, Glass CPAs) into the 6th largest accounting firm (McClintock) in the United States.

- Improved top line by X% and bottom line by X% during tenure. Also improved accounts receivable and work-in-process days outstanding by X%.
- Worked closely with other McClintock professionals in other disciplines to bring their services to the Boca Raton client base.
- Mentored five individuals to obtain management positions.

Partner, Local Accounting Company – Jones, Smith, Glass CPAs (1996 – 1999)

Youngest partner elected to Partner position.

- Continued to grow client base.
- Developed a strong expertise in the international tax area.
- Mentored and developed younger staff and fellow partners.

Manager, Jones, Smith, Glass CPAs (1984 – 1996)

Within ten years of original hire elected to partner status. Responsible for overall management of client engagements and new business development.

- Managed a team of professionals to complete client assignments.
- Conducted various in-house training seminars for professional staff.
- Spearheaded and conducted numerous client seminars on relevant financial and tax topics.
- Developed a book of business of close to \$XXK of mid-sized entrepreneurial companies primarily in the real estate, construction, wholesale distribution, travel, international trade and professional services industries.

Staff Accountant, Jones, Smith, Glass CPAs (1977 – 1984)

Performed attest and tax services for firm's client base of mid-sized companies. Worked to continually improve skills and developed into a reviewer within 5 years. Was put in charge of client engagements and was dealing with the owners and management of assigned clients within 6 years of hire.

EDUCATION & CREDENTIALS:

M.S. Masters of Science in Management, Taxation (1994)

Florida Atlantic University

B.A. Business of Administration, Accounting (1987)

Florida Atlantic University

CPA in the State of Florida (since 1978)

PROFESSIONAL AFFILIATIONS:

Florida Institute of Certified Public Accountants (FICPA)

American Institute of Certified Public Accountants (AICPA)