

WATSON CPA GROUP

9475 Briar Village Point, Suite 325
Colorado Springs CO 80920
719-387-9800 tel
855-345-9700 fax
support@watsoncpagroup.com

SUMMARY

A Colorado Springs business consultation and tax preparation firm since January 2007 specializing in-

- ▲ Business Consultation and Valuation
- ▲ Financial Analysis and Planning
- ▲ Divorce Litigation Support and Mediation
- ▲ Tax Preparation, Modeling and Representation

EXPERIENCE

The Watson CPA Group has a total of thirteen full-time professionals-

Tina Watson, CPA, CFP®, MBA	Senior Partner	<i>Individual CV Follows</i>
Jason Watson, EA, CVA	Managing Member	<i>Individual CV Follows</i>
Sally Rhoades, CPA, CFP®	Tax Manager, Financial Planner	
Michelle Day, EA, CFE	Tax Manager	
Jon Neilson, CPA	Tax Supervisor	
Theresa Eggen, CPA	Tax Supervisor	
Amanda Rowles	Business Development	
Brian Baum, CPA	Staff Accountant	
Keegan Patterson	Staff Accountant	
Melissa LeGree	Staff Accountant	
Karen Pleshek	Administrative Assistant	
Shelby O'Donnell	Administrative Assistant	
Julie Slaughter	Administrative Assistant	

RECENT VALUATIONS AND CASEWORK (ALL PERFORMED BY JASON WATSON AS LEAD)

2017	Mllr	Limited Scope Calculation	Dissolution of Marriage
2017	Dw	Full Scope Valuation	Prenuptial Agreement
2017	Bdgn	Limited Scope Calculation	Dissolution of Marriage
2017	Hrpr	Divorce Financial Analyst	Dissolution of Marriage
2017	Eglr	Limited Scope Calculation	Dissolution of Marriage
2016	Jrvk	Limited Scope Calculation	Dissolution of Marriage
2016	Bst	Limited Scope Calculation	Dissolution of Marriage
2016	McGr/Strnr	Divorce Financial Analyst	Dissolution of Marriage
2016	Bly	Divorce Financial Analyst	Dissolution of Marriage
2016	Bbsn	Divorce Financial Analyst	Dissolution of Marriage
2016	Bxlr	Limited Scope Calculation	Dissolution of Marriage
2016	Wlsn*	Full Scope Valuation	Represented Sale
2015	Sbw	Limited Scope Calculation	Represented Sale and Acquisition
2015	Dw nsrnc / Dw	Full Scope Valuation	Represented Sale

2015	Grvs	Limited Scope Calculation	Represented Acquisition
2015	Wndm	Limited Scope Calculation	Dissolution of Marriage
2015	Jmmy Jhn's / grt	Full Scope Valuation	Represented Acquisition
2014	Fnr Pnts / Trctt	Limited Scope Calculation	Represented Acquisition
2014	Yng	Limited Scope Calculation	Represented Acquisition
2014	Krmhlz	Limited Scope Calculation	Represented Acquisition
2014	Dw	Divorce Financial Analyst	Dissolution of Marriage
2014	Lnt	Limited Scope Calculation	Represented Acquisition

* Robert Johnson, CPA, Assisted

TINA WATSON, CPA, MBA, CFP®

9475 Briar Village Point, Suite 325
Colorado Springs CO 80920
719-428-3257 direct
tina@watsoncpagroup.com

SUMMARY

A Certified Public Accountant, Certified Financial Planner and financial professional performs tax modeling, business consultation and settlement agreement analysis.

EXPERIENCE

Senior Partner

January 2007 thru present

Watson CPA Group – Colorado Springs, Colorado

- Consult with small business owners on tax, business operations, retirement and estate planning strategies
- Advise divorcing couples on marital property valuation, tax strategies and financial planning
- Evaluating and managing all business expansion opportunities and development

Registered Investment Advisor

January 2013 thru present

SFD Capital – Colorado Springs, Colorado

- Create financial plans, investment strategies, risk mitigation and estate plans
- Incorporate tax, financial and legal worlds into a singular team of professionals

Finance Manager

April 2006 thru August 2013

Northrop Grumman Information Systems – Colorado Springs, Colorado

- Cash forecast and variance analysis
- Maintain and reconcile contract modifications, strategic analysis and reporting
- Program risk assessment, support audits

Accountant

The Shafer Group – Colorado Springs, Colorado

Accountant

Nelson Fink & Company – Colorado Springs, Colorado

EDUCATION

Master of Business Administration, 2012

Colorado State University, Fort Collins, Colorado

Bachelor of Science in Accounting, 1999

University of Phoenix, Colorado Springs, Colorado

Bachelor of Business Administration, 1994

Ambassador University, Big Sandy, Texas

PROFESSIONAL CREDENTIALS AND MEMBERSHIPS

- Certified Public Accountant State of Colorado, May 2003
- Member, American Institute of Certified Public Accountants
- Series 65, Financial Industry Regulatory Authority and Securities Exchange Commission
- Certified Financial Planner, November 2016

JASON WATSON, EA, CVA

9475 Briar Village Point, Suite 325
Colorado Springs CO 80920
719-428-3261 direct
jason@watsoncpagroup.com

SUMMARY

An Enrolled Agent, Certified Valuation Analyst and tax professional performs business valuation and settlement agreement analysis.

EXPERIENCE

Managing Member, Business Development

January 2007 thru present

Watson CPA Group – Colorado Springs, Colorado

- Provide business valuations, due diligence, acquisition representations, tax defense
- Consult with small business owners on tax, business operations, retirement and estate planning strategies
- Advise divorcing couples on marital property valuation, tax strategies and financial planning
- Prepare and file 400 tax returns annually

Registered Investment Advisor

January 2013 thru present

SFD Capital – Colorado Springs, Colorado

- Create financial plans, investment strategies, risk mitigation and estate plans
- Incorporate tax, financial and legal worlds into a singular team of professionals

Author

Taxpayer's Comprehensive Guide to LLCs and S Corps

- Written for small business owners to explain self-employment and income tax, payroll, retirement, health care, valuation and succession issues
- 5-6 paperback copies sold on Amazon per day, available in Kindle, Nook, iTunes among others

Guest Lecturer

Strafford Publications

- Feb 1 2017, Reasonable S Corp Compensation
- August 10 2016, Section 469 Passive Activity Loss Limitation Rules
- May 10 2016, S Corp Owning Multiple Entities
- Dec 2 2015, Reasonable S Corp Compensation

EDUCATION

Master of Science – Accountancy, 2017

Regis University – Denver, Colorado

National Association of Certified Valuators and Analysts (NACVA), Business Valuation Course

December 2016, 40 hours classroom training, CVA Examination Passed

CVA Candidate pending final case study

American Institute of Certified Public Accounts (AICPA), Business Valuation Course

June 2016, 40 hours classroom training

Master of Business Administration – Operational Systems, 2000

University of Wisconsin – Madison, Wisconsin

Bachelor of Business Administration – Human Resources, 1994

University of Wisconsin – Madison, Wisconsin

PROFESSIONAL CREDENTIALS AND MEMBERSHIPS

- Certified Valuation Analyst, National Association of Certified Valuators and Analysts
- Completed 3 parts of CPA exam (completion July 2018)
- Enrolled Agent, Internal Revenue Service
- Certified Divorce Financial Analyst, Institute for Divorce Financial Analysts
- Volunteer for National Institute of Trial Advocacy as a Financial Expert Witness
- Series 7 and Series 6, Financial Industry Regulatory Authority and Securities Exchange Commission
- Member, National Association of Tax Professionals
- Member, American Institute of Certified Public Accountants (as Managing Member of Watson CPA Group)
- Airline Transport Pilot, Federal Aviation Administration