



Loreine K Smith

Work Experience

Loreine Smith, CPA, CFP
(Texas & Colorado #9036841)

2002 - 2021-(includes a sabbatical)

- Tax Planning, Review and/or preparation individuals, sole proprietorships, LLC, partnership, Corporate, NonProfit
- Examination and analysis of Financial activity - businesses or individuals in civil and divorce matters
- Expert Testimony, Trial, Hearings, Deposition
- Financial Neutral - Conflict Resolution
- Controller - Retail Company ~ 11 million
- Tax Resolution with Internal Revenue Service
- Retention, development, management of Client base, process flow, and personnel
- Accounting Data Flow, responsibilities, guidelines, and training
- More available upon Request

Educational History

UTA - BBA Accounting
AICPA Business Valuation School
Basic Mediation Training
Collaborative Training
Former Instructor, Southern Methodist University
CDFP Program

Skills Summary

Taxation
Expert Witness Testimony
Forensics/Valuation
Budgeting and Cost Analysis
Financial Planning
Strategic
Process Improvement
Accounting Systems
Project Design, Management
Communication/Teaching
Financial Analysis
Financial Presentation
Financial Writing
Speaking
Conflict Resolution
Active Listening
Organizational Intuitive

Achievements

- Member, American Institute of CPA's
- The Tax Advisor
- Certified Financial Planner Certificant
- Consumer Research Council of America Top Financial Planners, Five Star Wealth Professional



References Available Upon Request



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