



Loreine K Smith

Work Experience

Loreine Smith, CPA, CFP
(Colorado #9036841)

2002 - 2023

- Tax Planning, Review and/or preparation individuals, LLC, partnership, Corporate, S Corp
- 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
- Conflict and Financial Coaching
- More available upon Request

Educational History

UTA - BBA Accounting
AICPA Business Valuation School
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
Accounting Systems
Project Design, Management
Communication/Teaching
Financial Analysis
Financial Presentation
Financial Writing
Speaking
Conflict
Resolution/Mediation
Active Listening
Organizational Intuitive

Achievements

- Consumer Research Counsel America
Top Financial Planners
- Five Star Wealth Professional
- The Tax Advisor
- Kaplan Instruction



References Available Upon Request

