

# DAVID J. KAPLAN

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## RESUME

### PROFESSIONAL EXPERIENCE:

**David J. Kaplan** - *Tax, Accounting & Business Consulting Firm*      **1969-Present (52 yrs.)**

- Established and operates a Professional Tax Preparation and Accounting & Business Consulting Firm – currently located in Rochester, Minnesota.

*(Former locations in Reno/Sparks, Nevada, between 2005 and 2016; and, in Irvine, Newport Beach, Westminster, Long Beach, Monrovia, Arcadia, Monterey Park, and Alhambra, California, between 1969 and 2004.)*

- Prepare annual federal, state and city income tax returns for individuals and businesses, including Individual, Partnership, Corporation, Estates and Trusts, Gift, Estate and related state Inheritance tax returns, and foreign tax returns for Canada and United Kingdom.
- Provide bookkeeping and accounting services to business clients. Prepare Financial Statements for business clients. Prepare federal, state and local quarterly and annual payroll tax, sales tax and other local tax returns and reports, employee W-2 forms, 1099 forms, etc. for business clients.
- Represent clients before Internal Revenue Service and other government agencies in tax audit and collection matters.
- Employ staff bookkeepers, accountants and tax professionals.
- Assist business clients with computer installations and accounting software set-up.
- Assist clients with tax planning.

**Tax Preparer,** *H&R Block, Sparks, NV*

**12/2007 - 4/2008**

- Seasonal employment as preparer of income tax returns.

**Tax Preparer,** *H&R Block Premium, Newport Beach, CA*

**1/1998 - 8/1999**

- Seasonal employment as preparer of complex income tax returns.

**Tax Manager,** *David Fox & Co., CPA's, Arcadia, CA*

**1/1981 - 4/1985**

- Managed operations of Certified Public Accounting firm's Tax Department
- Prepared annual federal, state and city income tax returns for individuals and businesses, including Individual, Partnership, Corporation, Estate and Trust, Gift, Estate and state Inheritance tax returns. .
- Provided Bookkeeping and Accounting Services for businesses. Prepared Financial Statements for business clients. Prepared federal, state and local quarterly and annual payroll tax, sales tax and other local tax returns and reports, employee W-2 forms, 1099 forms, etc. for businesses
- Represented clients before Internal Revenue Service and other government agencies in tax audit and collection matters.
- Supervised bookkeepers, accountants and tax professionals.
- Assisted clients with tax planning.

**Founder & CEO,** *Monterey Park Financial Services, Monterey Park and  
Newport Beach, CA*

**1979-1995**

- Established and Operated a Real Estate Mortgage Brokerage Firm licensed by the California Department of Real Estate.
- Arranged Real Estate loans for individuals and businesses.
- Listed and Marketed real estate properties for sale.
- Managed real estate Rental Properties for clients.

**Corporate Controller,** *Duraset Composing Company, Los Angeles, CA* **1969-1975**

- Managed financial affairs of major Southern California Printing and Typography business, consisting of three divisions, with operations in Los Angeles and Anaheim, CA.
- Appointed Treasurer of company by Board of Directors.
- Supervised accounting and office staff at both locations. Prepared weekly payroll checks for 70 employees. Maintained corporate accounting books and records. Approved contracts and agreements for the company. Prepared budgets. Purchased and/or Leased company vehicles and equipment as necessary. Negotiated Employer's Collective Bargaining Agreements with Los Angeles and Anaheim/Long Beach Typographical Unions. Appeared in Small Claims Courts on collection matters. Hired staff as necessary. Traveled on a regular basis between Los Angeles and Anaheim, CA.

**Tax Preparer and Bookkeeper,** *California Tax & Management Service, 1967-1969  
Montebello, CA*

- Preparation of federal and state individual income tax returns.
- Write-up accounting and bookkeeping for business clients

## **OTHER EXPERIENCE:**

**Notary Public,** *Secretary of State of the State of California*

**1980 – 1994**

- Provided Notary Services for clients and the general public, with offices in Los Angeles County and Orange County, California.
- Provided Document Signing and Notary Services for various Title Insurance Companies.
- Authorized to provide Notary Public Service anywhere within the State of California.

**President,** *Commander Flying Association, Newport Beach, CA*

**1979 - 1995**

- Co-Founding member of Association in 1979. In 1982, as President established the Association as an International Association increasing membership from 50 to over 600 world-wide members. Responsible for first ever manufactures recall of entire fleet of 1,000 aircraft for modification to the wings and tail. Negotiated aircraft modifications with the manufacture. Coordinated modification approvals with the Federal Aviation Administration (FAA).

**Instrument-Rated Private Pilot,** *Federal Aviation Administration*

**1975 - Present**

- Owned and operated several private aircraft. Have flown throughout the United States, Mexico and to the Dominican Republic. Accumulated over 2,500 hours of flying time. Obtained Instrument Rating – January, 1976  
Obtained Private Pilot License – January 1975

**Motorcycle Drivers Endorsement,** *States of California and Nevada*

**1968 - Present**

- Owned and operated several motorcycles over the period of time.

## **EDUCATION:**

*Truckee Meadows Community College, Reno, NV - Paralegal/Law Program 2009 - (American Bar Association (ABA) approved)*

*California State University – 1971*

*East Los Angeles Jr. College – 1969*

*Rio Hondo Jr. College - 1968*

*Whittier Union High School, Whittier, CA 1967*

*Annual Continuing Professional Education for Tax Preparers*

**MEMBERSHIPS:**

*National Association of Tax Professionals*

*National Association of Accountants*

*Lions Club International*

*Order of DeMolay*

*References Available Upon Request*

March 10, 2022