



James A. George

*Certified Public Accountant
Certified Valuation Analyst*

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CFO-Consulting
Business Strategies
Tax Services

Assurance
Audit Preparation

Expert Witness
Fraud Investigation

Summary

- ◆ Licensed Massachusetts Attorney
- ◆ JD, Suffolk University
- ◆ Licensed as Certified Valuation Analyst (CVA) since 2004
- ◆ Licensed as Certified Public Accountant (CPA) since 2002
- ◆ *Magna Cum Laude* BS in Accounting, Franklin University, 1999
- ◆ Courtroom Qualified Business Valuation Expert
- ◆ Strong background in consulting, auditing and business valuation
- ◆ Over 17 years of professional experience

Biography

After graduating from Franklin University *Magna Cum Laude* with a Bachelor of Science degree in Accounting, Jim rapidly progressed through the ranks of public accounting. As a Senior Accountant at Holbrook & Manter, CPAs, a regional CPA firm, he performed audit, tax and valuation engagements of privately held companies. Jim audited clients in a wide range of industries including manufacturing, agriculture, and finance. During his tenure at Holbrook & Manter, CPAs, he assisted the lead business valuation specialist on several valuation engagements and he took part in a fraud investigation for a large agricultural enterprise.

Upon moving to Massachusetts, Jim joined the team of Rodman & Rodman, P.C. in Newton, MA as a Manager where he led a successful team of business valuation specialists. He also managed teams of nonprofit and for-profit auditors, tax specialists, and business consultants for professional companies.



Shortly after, Jim put his expertise to use and founded James A. George, P.C., a boutique CPA practice with superior customer-service. The firm has three primary areas of focus:

The primary focus areas for JAGPC business consulting services including CFO consulting; audit preparation; and periodic financial reporting. In addition to these boutique services, JAGPC also offers other traditional CPA services such as tax planning and preparation, accounting systems setup and more. The firm's secondary service area revolves around assurance engagements such as audit, review and compilation engagements for non-profit and for-profit entities. Finally, the third area of its practice is centered around Business Valuation services such as litigation support, expert witness testimony, fraud investigation, business, estate, and succession planning.

CVA Designation

Having a CVA expert perform your business valuation in a litigation setting is extremely important. As a CVA, there are mandatory standards accepted by the legal community that must be followed. CVAs are required to undergo rigorous educational examinations and testing. After obtaining the designation, NACVA (National Association of Certified Valuation Analysts) requires that its members stay abreast the changes in the field by mandating recertification every three years. This recertification includes participation in a Quality Enhancement Program, a current update in business valuation class, and additional continuing professional education. Only CPAs can hold the designation of CVA, which adds further credibility in the courtroom. The recertification requirements are the following:

- ◆ 40 hour week of training
- ◆ Half day exam
- ◆ Sample report graded by NACVA
- ◆ CPE requirements
- ◆ Active CPA License

Memberships and Associations

Jim George is not only an active member of the Massachusetts Society of CPAs, but also serves on the Standards Committee of NACVA (National Association of Certified Valuation Analysts) to oversee the development and adherence to valuation standards. Jim George actively participates in the following programs and is member of the following organizations:

- ◆ Massachusetts Society of CPAs
- ◆ NACVA – National Association of Certified Valuation Analysts
- ◆ Standards Board of NACVA
- ◆ Suffolk University MBA/JD
- ◆ Certified QuickBooks Pro Advisor

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Professional Profile

On a traditional CPA-level, Jim was engaged in accounting, auditing or consulting services for companies in the following industries:

- | | |
|---------------------------------|---------------------------------------|
| Adoption Agencies | Market Investment |
| Assisted Living | Medical and Health Care |
| Automotive | Montessori Schools |
| Broadcasting | Moving/Relocation Services |
| Capital Management | Pre-Schools |
| Charter Schools | Printing/Duplicating |
| Child Care | Professional Societies |
| Community Action | Restaurants |
| Courier Services | Retail Industry |
| Cultural Heritage Orgs | Retirement Investment |
| Educational Institutions | Safe Houses and Shelters |
| Environmental Protection | Service-Based Companies |
| Estates | Sports and Recreation |
| Executive Compensation | Technology Companies |
| Financial Corporations | Transit Authorities |
| Governments | Transportation Logistics |
| Health Agencies | Vocational Colleges |
| Historical Societies | Women's Advocacy |
| Humane Societies | Youth Outreach and Development |

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Jim's business valuation experience includes projects for estate, divorce, and tax planning. Jim performed business valuations for companies in the following fields:

- | | | |
|----------------------|----------------------|-------------------------------|
| Construction | Farming | Real Estate |
| Tanning Salon | Manufacturing | Franchised Restaurants |
| Storage | | |