

WCG

2393 Flying Horse Club Drive
Colorado Springs, CO 80921
719-387-9800 tel
855-345-9700 fax
support@wcginc.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

WCG has a total of 46 full-time professionals including these Partners

Tina Watson, CPA, CFP®	Senior Partner	<i>Individual CV Follows</i>
Jason Watson, CPA, CVA, EA	Senior Partner	<i>Individual CV Follows</i>
Jason Schneider, CPA, CGMA	Partner	
Michelle Day, CPA, CFE, EA	Partner	
Sally Rhoades, CPA, CFP®	Partner	
Rachael Weber, CPA	Partner	
Megan Oeltjenbruns, CPA	Partner	

RECENT VALUATION REPORTS (ALL PERFORMED BY JASON WATSON AS LEAD)

2023	WCHntrprss	Limited Scope Calculation	Gifting
2023	Cdncnsls	Limited Scope Calculation	Dissolution of Marriage
2023	SMCM	Limited Scope Calculation	Sale
2023	jdtechnsltns	Full Scope Valuation	Sale
2021	ThrPIIs	Limited Scope Calculation	Business Dissolution
2021	CABlsmc	Limited Scope Calculation	Sale
2020	BDBBQ	Limited Scope Calculation	Share Redemption
2020	BssPrt	Special Engagement	Internal Use
2019	Rsch	Divorce Financial Analyst	Dissolution of Marriage
2019	Crws	Special Engagement	Civil Matter for Business Damages
2018	Spr	Divorce Financial Analyst	Dissolution of Marriage
2018	Kllr	Divorce Financial Analyst	Dissolution of Marriage
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

TINA WATSON, CPA, CFP®

2393 Flying Horse Club Drive
Colorado Springs, CO 80921
719-428-3257 direct
tina@wcginc.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

WCG Inc. – 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

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, CPA, CVA, EA

2393 Flying Horse Club Drive
Colorado Springs, CO 80921
719-428-3261 direct
jason@wcginc.com

SUMMARY

A Certified Public Accountant (CPA), Certified Valuation Analyst (CVA), Enrolled Agent (EA) and tax professional performs tax planning, business structure analysis and business valuations.

EXPERIENCE

Senior Partner, Business Development

January 2007 thru present

WCG Inc. – Colorado Springs, Colorado

- Provide business valuations, due diligence, acquisition representations, tax defense
- Consult with small business owners on structure, tax planning, business operations, retirement and estate planning strategies
- Prepare and file 400 tax returns annually

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
- 250 to 300 copies sold on Amazon per month, available in Kindle, Nook, iTunes among others

Guest Lecturer

Strafford Publications

- Feb 2 2022, S Corporation Shareholder-Employee Compensation
- Jul 15 2021, Maximizing Home Office Deduction
- Jul 8 2021, May 10 2016, S Corp Owning Multiple Entities
- Feb 1 2017, Dec 2 2015, Reasonable S Corp Compensation
- August 10 2016, Section 469 Passive Activity Loss Limitation Rules
- Nov 2 2021, Late S Corp Election

EDUCATION

Master of Science – Accountancy, 2019 (program only, no degree)

Regis University – Denver, Colorado

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

December 2016, 40 hours classroom training, CVA Credential

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 Public Accountant, License 140411, California Board of Accountancy
- Certified Valuation Analyst (CVA), National Association of Certified Valuators and Analysts
- Enrolled Agent, Internal Revenue Service
- Volunteer for National Institute of Trial Advocacy as a Financial Expert Witness
- Member, National Association of Tax Professionals
- Member, American Institute of Certified Public Accountants (as Managing Partner of WCG Inc.)
- Airline Transport Pilot, Federal Aviation Administration