



David Evans, CPA

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SUMMARY

Good information helps business owners make better decisions. I have 21 years’ experience giving businesses greater visibility to do that. Helped clients in **real estate, construction, manufacturing, distributors, professional, retail, import/export, non-profit, and service** industries, including startups.

SKILLS

U.S. GAAP	Budgeting & Forecasting	Teaching
Systems and Internal Controls	QuickBooks, NAV, Excel	U.S., Canadian, and State Taxes

Accomplishments

Controllership / Consulting / Systems (21 years’ experience)

- For **general contractors, subcontractors, real estate developers, and property managers**, established and maintained good accounting systems to help owners see cash flows and monitor job costs and margins.
- For a builder, brought payroll in-house to **clarify profits** by project and overall.
- Prepared and interpreted financial **information** with business owners. Prepared graphs etc. for business owners.
- Assisted to create & implement **budgets**. Prepared and evaluated financial **projections**.
- Helped clarify business strategies, mission statements, and key performance indicators.
- Calculated net worth comparisons for **real estate investors**. Evaluated investments by touring properties and interviewing people. Showed real estate **investors** how to reach their goals 9 times faster.
- Researched, analyzed, and designed software **systems** and procedures to accelerate **cash flow**, provide **visibility**, and/or improve **internal controls**. Trained and supervised bookkeepers/office managers to implement those.
- Built and documented a **cost accounting** system for a manufacturer with 1600+ parts to prepare for financial statement audits. Calculated labor and overhead rates and build assemblies.
- For a **manufacturer**, upgraded from annual tax-based accounting to accrual basis monthly financial reports and key performance indicators (KPIs).
- **Created** management tools using Access®, Excel®, etc. to compensate for weaknesses in existing software.
- Identified and helped track **key indicators** to increase profits. Helped a company to survive by seeing, then improving, margins from 8% to 20%.

Tax

Helped a company with \$125 million in revenue to comply with and reduce taxes through:

- Sales Tax, State Income Tax, and Franchise Tax Nexus studies;
- Research & Development Tax Credit; • IC-DISC (Tax deduction for exporters);
- International Transfer Pricing; • Canadian Tax Planning;

Work History

Consultant / Director (2015-Present): NOW CFO

- Worked onsite at 20+ businesses in the greater Salt Lake area.
- Interviewed dozens of job candidates. Recommended staffing decisions to partners.

Accounting Manager (2007-2015): Morris & Dredge, CPAs

- Reviewed and supervised monthly and quarterly balance sheets, income statements, and cash flow statements, and analyses for businesses of all types.
- Prepared tax returns of all types and did tax projections for businesses and individuals.

Entrepreneur / Managerial & Tax Accountant (2002-2007): David M. Evans, CPA, P.C. and SolutionCFO

- Worked with CFO for Garbett Homes.
- Assisted with conversion of apartment building to condominiums.
- Left established job to consult small business owners. Sold new services to existing and new clients.

Assistant CPA (1995-2002) to Ralph D. Chipman, CPA

- Planned & led financial statement **audits**. Did litigation support, tax preparation, systems implementation, etc.

Adjunct Instructor

- **Taught** Accounting 101, Financial & Cost Accounting, Career Development, and Economics to students at 3 colleges.

Educational and Professional Accomplishments

Certified Public Accountant (CPA), Utah (1996-Present).

Bachelor’s and Master’s Degrees in Accounting, (1994 and 1995, University of Utah). Also studied music.

Certified Management Accountant (CMA) (2006-2007).

Graduate, Dale Carnegie Course® (2004).

Outsourced CFO - Operational Accounting - Consulting