

DUSTIN W. MCQUILLAN, CPA



Member AICPA & FICPA.

CAREER EXPERIENCE

MCQUILLAN & COMPANY, LLC

Accounting, Tax & Business Consulting

Jun. 2010 – Present

Organized my own professional services firm in May 2009. Develop and direct business as a licensed Certified Public Accountant in Tampa, Florida. Manage and deliver traditional accounting, bookkeeping, payroll and financial statement preparation engagements. Serve as trusted advisor for clients with multiple investments requiring CFO & Controller level service. Focus on tax compliance for individuals, partnerships, corporations, trusts and exempt-organizations. Produced and collected \$1,445,876 through Dec. 2016.

PERSONALITY

ENFJ:

Extraversion, Intuition, Feeling, Judging

Warm, empathetic, responsive, and responsible. Highly attuned to the emotions, needs, and motivations of others. Finds potential in everyone, wants to help others fulfill their potential. May act as a catalyst for individual and group growth. Loyal, responsive to praise and criticism. Sociable, facilitates others in a group, and provides inspiring leadership.

SKILLS

Management Information Systems:

Organization, systematization, process development and implementation.

Financial Information Professional:

Accounting, bookkeeping, financial reporting, capital formation, assurance & attestation, tax compliance, budgeting & forecasting, treasury management, cash flow projections, and strategic planning.

Sales & Marketing: Branding, digital advertising & promotion, acquisition cost analysis, research & development, market targeting.

Customer Service: Quality Control, fulfillment and distribution.

MCCLANATHAN, BURG & ASSOCIATES, LLC

Income Tax Planning & Preparation

Jan. 2017 – May 2018

Contributed thirty-two clients to subsidize \$138k of full-time salary with MBA CPA's in Jan. 2017, a full-service accounting firm in downtown St. Petersburg, Florida. Sharpened perspective for managing high-net worth clientele (\$1mm to \$35mm of investable assets). Focused on tax planning, filing, financial reporting and conditional covenant compliance. Prepared 140+ federal & state tax returns (for individuals, partnerships, corporations, trusts & exempt organizations) while representing and guiding taxpayer regulatory concerns toward resolutions.

VICI MARKETING GROUP, LLC

Corporate Controller

Jul. 2007 – May 2010

Served as Controller for multi-faceted marketing organization operating a 500+ seat call center in Largo, Florida. Supported financial, technology & information management roles required of a fast-paced, project-oriented sales environment.

KPMG, LLP

Staff Auditor

Dec. 2005 – May 2007

Gained experience working on Big 4 assurance engagements in Tallahassee, Jacksonville, Orlando, Tampa & Naples, Florida for Capital City Bank, Raymond James Bank, Ruth's Chris, Publix, Winn Dixie, & Stock Development.

EDUCATION

FLORIDA STATE UNIVERSITY

College of Business

Aug. 2001 – Apr. 29, 2006

Bachelor of Science in Accounting

3.02 GPA

Bachelor of Science in Management Information Systems

3.47 GPA

INDUSTRY EXPERIENCE

STRENGTHS

Connectedness: Has a strong faith in the links among all things. An ability to “connect the dots” provides others with perspective, guidance & hope.

Learner: Has a strong desire to learn and wants to continuously improve. Focuses on the process of “getting there”, rather than the outcome.

Input: Has a natural curiosity, interest and resourcefulness. Craves knowledge.

Intellection: Has a strong intellect, likes to think and is introspective. Values time to reflect, ponder & process ideas.

Discipline: Has a strong instinct to create order and directs energy to build structure, routine and organization.

SOFTWARE

Accounting & Tax: Thomson Reuters Virtual Office SaaS (*including NetStaff CS, NetClient CS, UltraTax CS, Accounting CS, Practice CS, Fixed Assets CS & Planner CS*), e-Forms, Checkpoint RIA, Intuit QuickBooks Online for Accountants (*including Desktop & Enterprise version 2019*), SAGE 50 and Timberline.

Communication & Design: Microsoft Office 365, Adobe Creative Cloud, Wordpress.org, Constant Contact, Mail Chimp & Aweber.

Data Management: Blue Host Virtual Private Server (VPS), Google G Suite, DropBox.

REFERENCES

Available upon request.

EXECUTIVE CPA | CFO | CONTROLLER

- **TAX PLANNING & PREPARATION:** Perform income tax planning for high-net worth individuals and small business owners to maximize the net-after-tax cash basis income. Prepare individual, corporate, partnership, trust and exempt-organization tax returns. Provide taxpayer representation to resolve federal & state compliance issues. Prepare and compile financial statements; Manage traditional bookkeeping functions.
- **REAL ESTATE DEVELOPMENT & CONSTRUCTION:** Served as executive CPA in private industry guiding capital formation and estate planning strategies for a full spectrum real estate development company headquartered in Tampa, FL. Managed \$700+mm in assets developed for completion; upgraded accounting & treasury management functions. Managed federal & state tax filings, PEO payroll processing, and third-party HUD Audits. Managed procurement of employee benefits.
- **HEALTH INFORMATION MANAGEMENT:** Served as lead financial executive guiding the capital formation, design and implementation of accounting information system and treasury for a Florida based start-up providing staffing services for Health Information Management. Assisted stakeholders to grow service fees to \$2.5mm over a fifteen-month period. Processed contracts with seven hospitals in four U.S. states. Supported HR function employing thirty-five employees & contractors located in thirteen U.S. states; Managed weekly revenue cycle & payroll processes;
- **PRIVATE EQUITY FUND:** Supported the transition of both corporate controller & CFO positions for one of the largest franchises in each of the Taco Bell, Pizza Hut and IHOP systems with offices located in Clearwater, Florida and Alpharetta, Georgia. Managed the accounting, financial reporting and treasury for investments in small middle-market private equities and top-tier nationally franchised restaurant businesses.
- **DIGITAL ADVERTISING & PUBLISHING:** Guided the strategic merger & acquisition of a \$10mm CPC Network. Managed the financial, treasury and HR functions for multi-faceted digital marketing agencies located in Florida, Pennsylvania and California. Supported executive level functions relating to brand initiatives, content creation, process design, data management and monetization, target market promotions, fulfillment and customer service. Served as trusted adviser for venture partners and key stakeholders. Managed the organization and fiscal processing of insertion orders executed with 400+ native advertisers and publishers.

LICENSES AND CERTIFICATIONS

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| - Certified Public Accountant | Oct. 2007 – Present |
| - Certified QuickBooks Pro-Advisor | Jan. 2012 – Present |
| - Notary Public Official | Oct. 2011 – Present |
| - Life, Health & Var. Annuity PL02-15 | Jul. 2010 – Aug. 2012 |