

## **Carlisle CPA**

### **and Associates, Inc.**

*Los Angeles Office:*

1730 Sawtelle Blvd., Suite 105  
Los Angeles, California 90025  
(310) 275-2942

21243 Ventura Blvd., Suite 138  
Woodland Hills, California 91364  
(818) 888-3223/ (805) 495-3197  
e-mail: [info@carlislecpa.com](mailto:info@carlislecpa.com)

*Pasadena Office:*

1055 E. Colorado Blvd., Suite 500  
Pasadena, California 91106  
(626) 441-0800

### *Curriculum Vitae*

#### **Employment History**

1988 – present    Sole practitioner  
1985 – 1988      Senior accountant, Kenneth Leventhal & Co. (now Ernst & Young)

#### **Education**

Bachelor's Degree, UCLA  
Master of Business Administration Program, CSUN

#### **Licenses and Designations**

Certified Public Accountant, State Board of Accountancy – 1988

Appointed as the Court's Expert under California Evidence Code §730 – 2004

Personal Financial Specialist, AICPA Specialization Accreditation Board

Accredited Personal Financial Specialist (PFS) – 1993

This designation is acquired by CPAs who have financial planning experience, continuing education, and pass a comprehensive and rigorous exam. They must meet recertification requirements every three years to maintain the designation.

Business Valuation Specialist, AICPA Specialization Accreditation Board

Accredited in Business Valuation (ABV) – 2003

The ABV designation is awarded to CPAs who provide evidence of substantial experience in business valuation, and who have passed a written exam covering the business valuation common body of knowledge. CPAs with the ABV designation must re-certify every three years, demonstrating continued involvement in the business valuation discipline and completing professional education requirements.

Financial Forensic Specialist, AICPA Specialization Accreditation Board

Certified in Financial Forensics (CFF) – 2008

The CFF designation encompasses specialized forensic accounting skills that CPA practitioners apply in a variety of service areas including: family law, litigation support, and business valuations.

Mediator, Certified by Los Angeles County Bar Association – 2005

Registered Investment Advisor, Department of Corporations – 2000

*Accredited in Business Valuation*

*Member of American Institute of CPAs, California Society of CPAs and Associate Member Los Angeles County Bar Association  
Personal Financial Specialist, Certified in Financial Forensics*

Real Estate Broker, Department of Real Estate – 1992

Insurance Broker, Department of Insurance – 1976

Lifetime Adult School Teaching Credential, Board of Education – 1975

### **Legal Community Service**

Los Angeles Superior Court Accountants' ADR Pro Bono Panel  
Fee Arbitration Panel, San Fernando Valley Bar Association  
Mediation Weeks at Van Nuys Courthouse  
Settle-O-Rama Program, Los Angeles Superior Court, October, 2008.

### **Associations and Memberships**

California Society of CPAs Litigation Support – Family Law Section  
Los Angeles County Bar Association – Associate Member  
Beverly Hills Bar Association – Associate Member  
San Fernando Valley Bar Association – Associate Member  
Ventura County Bar Association – Associate Member  
Los Angeles Collaborative Family Law Association  
Coalition for Collaborative Divorce, Inc. – founding Board Member  
American Institute of CPAs  
CP Cal – Collaborative Practice California – former Board Member

### **Speaker, Panels and Media**

California Society of CPA's Podcast "Retirement Planning" September, 2015  
KTTV Television News "*Pink Collar Crime*," January, 2015  
National Association of Social Workers "*Collaborative Divorce: A New Way of Getting Divorced*," October, 2014  
Pasadena Collaborative Divorce "*Marital Standard of Living*," July, 2013  
San Fernando Valley Bar Assoc. "*Marital Standard of Living: What Use Is It?*" April, 2013  
  
Coalition for Collaborative Divorce "*Dealing with Unequal Bargaining Power and Inequitable Agreements in Consensual Dispute Resolution*," November, 2012  
California CPA Society Business Managers Committee "*How You Can Save Time and Your Clients' Money While They Get Divorced Peacefully, Respectfully and With Confidentiality*," July, 2012  
Los Angeles County Bar Assoc. *The Next Decade in Family Law Dispute Resolution*, April, 2012  
Yahoo! Finance "*8 Zany Tax Deductions to Avoid Claiming*," February, 2012  
KABC Television News Segment "*Last Minute Tax Tips*," December, 2011  
UWLA School of Law "*Taxation and Family Law*," November, 2011  
AOL Wallet POP "*Getting Divorced or Separated? 7 Financial Mistakes Not to Make*," June, 2011  
CBS MoneyWatch.com "*Tax Tips for a New Divorce*," March, 2011  
Coalition for Collaborative Divorce "*Collaborative Divorce in Today's Economy*," November, 2010  
San Gabriel Valley Psychological Association "*When the Marriage Can't be Saved: Guiding Your Clients To a Better Divorce*," March, 2010  
Oxnard College "How To Have a Respectful Divorce," May, 2009

*Accredited in Business Valuation*

*Member of American Institute of CPAs, California Society of CPAs and Associate Member Los Angeles County Bar Association  
Personal Financial Specialist, Certified in Financial Forensics*

KNBC Television News Segment “Today in LA” Last Minute Tax Advice – April, 2009  
 Collaborative Practice California Conference “*Foreclosure, Forbearance, Bankruptcy and Other Issues Related to the Recession,*” April, 2009  
 Lancer Radio “Economy, Communication, and Leadership – FDR 1933,” Pasadena City College, December, 2008  
 Southern California Institute of Law “*Neutral Financial Expert in Alternative Dispute Resolution,*” June, 2008  
 Coalition for Collaborative Divorce “*How to Get the Most Benefit from the Neutral Accountant in a Mediation or Collaborative Setting,*” May, 2008  
 KTTV Television News Segment. “*Financial Cheating,*” May 9, 2007  
 Collaborative Practice California Conference “*Creative and Durable Settlements: Engaging the Financial Neutral,*” May, 2007  
 KPCC Airtalk Radio Program with Larry Mantle “Collaborative Law,” January 24, 2007  
 California Society of CPAs Family Law Section “*Legislative Update on Assembly Bill 402 – The Collaborative Family Law Act,*” July, 2006  
 California Society of CPAs Family Law Section “*Family Law Tax Update,*” May, 2006  
 KCAL Television News Program “*Financial Planning: Impact of Rising Gas Prices and Falling Home Prices,*” May, 2006  
 UCLA Extension Class – Collaborative Law – “*Financial Specialists,*” February, 2006  
 California Society of CPAs Litigation Support Family Law Section “*ADR – Mediation & Collaborative Law: The Good and the Bad,*” January, 2006  
 California Society of CPAs San Fernando Valley area meeting “*Litigation Support,*” November, 2005  
 San Fernando Valley Counseling Center “*Collaborative Divorce Therapists Make a Difference,*” June, 2005  
 Coalition for Collaborative Divorce “*Financial Specialist’s Role in Collaborative Divorce,*” April, 2005  
 Los Angeles Collaborative Family Law Assoc. “*All Roads Lead to Collaborative Law: Enrolling Clients in the Collaborative Process,*” April, 2005  
 Los Angeles Collaborative Family Law Assoc. “*Enrolling Clients in the Collaborative Process,*” March, 2004  
 Pasadena Bar Assoc. “*Collaborative Law: Challenging Opportunities for Attorneys*” September, 2003  
 Los Angeles Collaborative Family Law Assoc. “*The Financial Specialist in Collaborative Law,*” July, 2003  
 Time Warner Public Service Television Series, Speaker “*Loving Reorganization,*” October, 2002  
 Los Angeles County Psychological Assoc. “*Introduction to Cooperative Divorce,*” October, 2001  
 California Bar Assoc. “*Interdisciplinary Divorce Mediation: Creating a New Model for High Conflict Couples,*” June, 2000  
 Southern California Mediation Assoc. “*A Model for Multi-Disciplinary Mediation,*” October, 1999

## **Publications**

“*Finance Tips - Law School Loans,*” New Esq., March, 2011  
 “*Modern Family Meets the Great Recession and Divorce,*” Valley Lawyer, San Fernando Valley Bar Association, December, 2010

*Accredited in Business Valuation*

*Member of American Institute of CPAs, California Society of CPAs and Associate Member Los Angeles County Bar Association  
 Personal Financial Specialist, Certified in Financial Forensics*

*“Mediation Mirrors the Marriage,”* Valley Lawyer, San Fernando Valley Bar Association, May, 2010  
*“Effective Use of an Accountant in Divorce,”* Valley Lawyer, San Fernando Valley Bar Association, March, 2009  
*“Collaborative Corner,”* Citations, Ventura County Bar Association, January, 2007  
*“Middle Age (and Older) Divorce,”* 2005 California Society of CPAs Family Law Conference, November, 2005  
*“The Accountant’s Role in Cooperative Divorce,”* The Los Angeles Psychologist, Sep. / Oct., 2001

### **Quoted in Publications**

*“6 Common Money Mistakes Newlyweds Need to Avoid,”* Kiplinger.com, July, 2015  
*“Divorce & Taxes: Tax Planning for Property Settlements, Financial Support & Filing Returns,”* About Money, July, 2014  
*“Before the Cake and Wedding Dress: Couples Should Discuss Finances Before Saying ‘I Do,’”* Mainstreet.com, June, 2014  
*“Split City,”* Men’s Health, April, 2014  
*“Surviving a Meltdown,”* The Costco Connection, January, 2009  
*“Your Money – The War of the Roses,”* Los Angeles Times Business Section, August, 2007

### **Continuing Education**

Attendance at continuing education courses and seminars in the field of family law, business valuation, federal and state taxation, mediation and collaborative law training, retirement planning and investments, reasonable compensation, real estate and insurance at the Los Angeles County Bar Symposium, San Fernando Bar Association meetings, California Society of Certified Public Accountants Family Law Conferences and Business Valuation and Financial Planning meetings.