

A Presentation of Professional Qualifications

Dante Lee Montoya, CPA

Certified Public Accountant

Business / Tax Consultant Advisor

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Mission

My business objective is to enhance the overall profitability, competitiveness, and value of your business.

Qualifications

Business assignments for a multi-talented Accounting and Management Professional which have resulted with remarkable insightful ability for identifying ways to reduce costs, increase systems / programs efficiencies and develop resolution to complex business situations. An implemented business background which has utilized a proven extensive knowledge of tax law, business systems development, financing and financial/management reporting systems to develop superior operations results and profitability.

Education

Bachelor of Science Degree, Business Administration

Fort Lewis College, Durango, Colorado

Emphasis: *Accounting, Economics, and Business Administration*

Professional Development

Twenty-eight years of continuing professional educational encompassing accounting, auditing, management, taxation, finance, systems development, and computers, including graduate level course work.

Licensure

Licensed Certified Public Accountant, States of Washington, Oregon, Utah and California

Employment History

1990 - Present

Dante L. Montoya Certified Public Accountant, Business/Tax Consultant, PLLC Kennewick, Washington

~ Financial Reporting; Auditing; Accounting; Taxation; Systems Development; Business Consultation; Business and Estate Valuations; Financial Planning and Modeling

2001 - 2007

Benton Franklin Council of Governments, Richland, Washington

~ Senior Economic Development Loan Investment Officer

1991 - 1999

Lockheed Martin Hanford Company, Richland, Washington

~ Financial Integration Management; Configuration Management; Project Management; Business Systems Development

1984 - 1991

Energy Northwest Company, Richland, Washington

~ Lead-In-Charge Internal Auditor

1977 - 1984

Deseret Electric Generation and Transmission Cooperative, Salt Lake City, Utah

Colorado Interstate Gas Company, Colorado Springs, Colorado

~ Internal Audit Manager, Senior Financial Statement / Rate Development Analyst

Areas of Expertise:

- ~ Income Tax Consultation / Preparation
- ~ Estate Tax Consultation / Preparation
- ~ Real and Personal Tax Valuation Consultation
- ~ Audits, Reviews Compilation and Assembly of Financial Statements
- ~ Agreed Upon Financial Statements and Reports
- ~ Business Formation Consultation
- ~ Business Issues Identifications and Resolution
- ~ Fraud and Forensic Audits and Investigations
- ~ Medium and Small Business Financing Alternatives
- ~ Business Accounting and Reporting Systems
- ~ Business Valuations
- ~ Business and Dissolution Mediation / Arbitration
- ~ Project Estimating and Control Services

Identification / Development / Implementation / Design of Enhanced Business Competitiveness

Selected Contributions:

- ~ Business turnaround of an \$11M Regional Economic Development Loan Portfolio, which provided for resolution, collection and recovery on \$2.95M of problems loans/investments and increased the overall loan/investment portfolio income performance and enhanced regional job creation. Provided implementation of identified Regional Comprehensive Economic Development Strategies.
- ~ Developed and Implemented Internal Audit Plans for two major utilities. Developed control risk analysis of operations and plant construction resulting in over 50 audits during eight years, which strengthened business and operations controls and reduced operating and construction costs by \$8M. Identified and developed operational contract savings that resulted in budget and cost savings of nearly \$2M annually. Identified and developed cost savings that resulted in a budget reduction of nearly \$.95M.
- ~ Produced cost savings in excess of \$21M in a Pre-treatment Project Conceptual Design, earning Lockheed Martin / Westinghouse (a U.S. Department of Energy contractor) \$.85M in increased contract fees.
- ~ Discovered tax savings of over \$.25M in alternative energy tax credits and dual property tax valuations for energy producers. This included \$.85M additional allowable costs in purchased gas cost adjustment rate filings. Developed contract calculation formulas for a natural gas company utilizing their field receipts and transfers, resulting in contract credits of \$2M annually.
- ~ Implemented Management Information Reporting and Control Systems, which improved operations and increased efficiency. Developed cost production analysis and reports that resulted in a 25% cost reduction per unit for an Aerospace Company. Developed contract and management control for the implementation of a major design and engineering contract in a major environmental cleanup program.

Professional Affiliations:

- ~ Washington State Board of Accountancy; Officer Secretary
- ~ American Association of Hispanic CPAs; Director at Large
- ~ The Educational Foundation for Women in Accounting; Board Trustee
- ~ American Institute of CPA's
- ~ National Association of State Boards of Accountancy
- ~ Washington Society of CPAs
- ~ American Institute of CPAs Division of CPA Firms
- ~ Women and Family Issues Executive Committee of the American Institute of CPA's
- ~ Diversity Family Workplace Committee for the Washington Society of CPAs; Chairman

Appointments:

- ~ Gubernatorial appointment to the Washington State Board of Accountancy
 - ~ State Director appointment to the Washington State Rural Development Loan Board
 - ~ Financial Industries Regulatory Authority, Board of Arbitrators; Public Arbitrator
 - ~ American Institute of CPAs Executive Committee for Women and Family Issues, Committee Member
 - ~ The Educational Foundation for Women in Accounting; Board Trustee
 - ~ Advisory Council of the Washington Society of CPAs; Board Advisor
 - ~ Professional Presenter: IRS Directors Practitioners Conference
 - ~ Professional Presenter: American Society of Women CPAs Annual Conferences
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