

**GREG R. WEISS, MBA, CPA/CFF, CVA**  
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## EMPLOYMENT

Harper Hofer & Associates, LLC, (formally Harper Lutz Zuber Hofer & Associates, LLC) 216 16<sup>th</sup> Street, Suite 850, Denver, Colorado 80202. 2010 to present. Associate.

RSM McGladrey, Inc., Denver, Colorado. 2008 to 2009. Denver Practice Leader for the Financial Forensics & Valuation Services Group.

McGladrey & Pullen, LLP., Denver Colorado. 2006 to 2008. Audit Manager.

Zick Business Advisors, Inc. (formerly Zick, Ransick, Julian, Weiss & Associates, Inc.), Englewood, Colorado. 1999 to 2006. Shareholder.

State Street Bank – Kansas City (formerly Investors Fiduciary Trust Company). 1993 to 1999. Manager – Investment Accounting.

## EXPERIENCE

Engagements include valuations, fraud examinations, litigation support, and business consulting as well as traditional tax and attestation work. All engagements include the design, creation and use of sophisticated spreadsheet-based modeling and specialized software to analyze financial data; coordination of multiple projects and deadlines; document management, review and summarization; preparation of exhibits; financial statement analysis and report preparation; and performance of industry and technical research.

Significant industries include: manufacturing, wholesale distribution, retail, professional services, not-for-profit entities and commercial real estate developers.

Significant engagements and experience include:

- **Valuations for Financial Reporting:** Valuations include purchase price allocations, impairment testing and share-based payments.
- **Valuations for Transactions:** Valuations prepared for buy-sell agreements, sales to insiders, sales to third parties, and for management planning.



- **Valuations for Employee Stock Ownership Plans (ESOPs):** Valuations used in feasibility studies, initial sales, annual valuations, and sales to third parties.
- **Valuations for Tax Purposes:** Valuations for gift and estate planning and returns and for share-based compensation under 409(a) of the Internal Revenue Code.
- **Fraud Investigation:** Investigation of fictitious employees, fictitious vendors, receivables kiting, check kiting, employee theft, vendor kick backs, bank fraud, investor fraud and diversion of funds through several interrelated companies. Analysis of common expenses charged to tenants by a commercial condominium association controlled by the project developer.
- **Commercial Litigation:** Analysis of billing disputes between companies including one as a Special Master to the Court. Valuation of manufacturing partnership for use in partnership dissolution litigation. Investigation of actions taken by Directors and Officers of a failed financial institution before and after being spun-off as a publicly traded Thrift.
- **Bankruptcy:** Solvency analyses of manufacturers, wholesalers and retailers.

## **EDUCATION**

Rockhurst University (Formally Rockhurst College), Kansas City Missouri. Degree: Masters of Business Administration, Dual Emphasis in Finance and International Business. Graduated in May 1998.

University of Northern Colorado, Greeley, Colorado. Degree: Bachelor of Science in Business Administration, Emphasis in Accounting. Graduated in May 1993.

## **PROFESSIONAL ACTIVITIES**

Certified Public Accountant (Colorado)

Certified in Financial Forensics

Certified Valuation Analyst

Member, American Institute of Certified Public Accountants



Member, National Association of Certified Valuation Analysts

Member, National Center for Employee Ownership

Member, The ESOP Association

Chairman, Rocky Mountain Employee Ownership Center

