

# David C Hale, CPA

**Detail-oriented Certified Public Accountant with nearly 26 years of experience with accounting, income tax, and business consulting.**

**Experience working with various organizational industries, compliance agencies, planning, budgeting, and financial reporting.**

## Work History

### Vice President of Finance, CFO

*Heritage University*

*Oct 2024 - Present*

- Responsible for the organization's finance and administration overseeing a staff of ten in the business office.
- Planning, organizing, leading, and coordinating financial activities, policies, strategies, budgets, and financial statements.
- Oversight of cash position, revenue and expense processing, financial reporting, auditing, and risk management.

### Assistant Professor

*Heritage University*

*Aug 2022 – Dec 2024*

- Assistant professor within the business department responsible for teaching accounting, economics, business law, investments, and income tax classes
- Duties include creating curriculum for five classes each semester, classroom instruction, grading, and guiding students toward their goal of achieving their degree
- Primary advisor to nearly 30 business and accounting students

### CPA, Director

*CliftonLarsonAllen*

*Oct 2015 - Apr 2023*

- Individual, business, corporate, and non-profit income tax preparation and review, income tax planning, business consulting for numerous industries, financial statement review, estate and trust preparation and planning, cost accounting, succession planning, managed a client base of over 380 individual and business clients, supervised and trained staff

### Adjunct Professor

*Heritage University*

*Aug 2019 - May 2021*

- Adjunct professor for the business department responsible for teaching investments and income tax classes
- Duties included creating curriculum for one class each semester, classroom instruction, grading, and assisting students

## Skills

- Robust financial and accounting expertise
- Strategic planning and risk management
- Excellent communication skills
- Critical thinking and problem-solving
- Experience working with hundreds of organizations
- Staff supervision and training
- Knowledge of many software applications
- In-depth understanding of debt planning and budgeting

## **CPA, Tax Manager**

*Northwest CPA Group*

*Nov 2010 - Oct 2015*

- Individual, business, corporate, and non-profit income tax preparation and review, income tax planning, researched and formulated opinions on complex income tax situations, business consulting, preparation and review of financial statements, managed client base of over 150 individual and business clients, supervised and trained staff, prepared and presented in-house continuing education classes

## **CPA, Owner**

*Hale & Smith, PLLC*

*Nov 2006 - Nov 2010*

- Individual, business, corporate, and non-profit income tax preparation and review, business consulting, preparation of compiled and reviewed financial statements, bookkeeping and payroll preparation, trained and supervised employees, drafted and implemented firm office manual and employee manual, co-managed all daily operations of the firm

## **Senior Accountant**

*John R. Edwards, CPA*

*Jun 2001 - Nov 2006*

- Managed daily operations of the firm, involved with hiring and interviewing employees, responsible for the accounting and bookkeeping of the firm including billing, trained and supervised up to 6 staff, income tax preparation and review, financial statement preparation and review, and business consulting

## **Senior Accountant**

*LeMaster & Daniels*

*Oct 1998 - Jun 2001*

- Income tax preparation, payroll preparation, trained new employees, involved with interviews of potential new hires, financial statement preparation including compilations, reviews, and audits

## **Education**

Bachelor of Science in Economics

*Dec 1997*

Eastern Oregon University, La Grande, OR

Associate of Arts in General Studies

*Jun 1994*

Blue Mountain Community College, Pendleton, OR

## **Certifications**

Certified Public Accountant

*2000 - present*

Series 65 License

*2019 - 2021*

## **Other**

- Past President, Treasurer, Board Member, TC Estate Planning Council, Jan 2013 – Apr 2021
- Treasurer, Board Member, WW Valley Chamber of Commerce, Jun 2008 - Jun 2010
- Officer Candidate, Oregon Army National Guard, Mar 1992 – Mar 2000