

# DAVID E. COFFMAN CPA/ABV/CFF, CVA



## Profile

Certified Public Accountant, who is Accredited in Business Valuation (ABV), Certified in Financial Forensics (CFF), and a Certified Valuation Analyst (CVA) specializing in small business valuation and advisory services. Over 30 years of small business experience – advising, owning and operating. Please visit <http://business-valuation-expert.com> to view a summary of my valuation experience by size of business, industry and purpose.

## Experience

### Valuation & Consulting

- 2008 to present – Founder, President & CEO of Business Advisors Group PC, Seaside Park, NJ. Formed to provide valuation and advisory services to small businesses in New Jersey.
- 1997 to present – Founder, President & CEO of Business Valuations & Strategies PC, Harrisburg, PA. Specializing in small business valuation and advisory services.
- 2006 to present – MCA Business Brokers, Harrisburg, PA. Formed strategic alliance with MCA to perform business valuations for their clients. Member of MCA's mergers & acquisitions team.

### Accounting

- 1986 to 1997 – Senior accountant at a local CPA firm. Duties included tax return preparation and performing compilation and review engagements, managing in-house computer network, and assisting clients with accounting software installation and maintenance.
- 1981 to 1984 – Staff accountant with regional CPA firm. Duties included tax return preparation and performing audit, review, and compilation engagements.
- 1980 to 1981 – General ledger accountant and supervisor of retail cost accounting department at a small public company.
- 1976 to 1979 – Staff accountant at a national and a regional CPA firm.

### Teaching

- Spring semester 2005 & Fall semester 2004 – Lebanon Valley College, Annville, PA. Instructor for managerial accounting course.
- Fall semester 2004 – Elizabethtown College, Elizabethtown, PA. Instructor for cost management accounting.

## David E. Coffman CPA/ABV, CVA

- Fall semester 1996 – Pennsylvania College of Technology, Williamsport, PA. Instructor for introductory accounting courses.
- November 1994 and October 1993 – Penn State Tax Program, University Park, PA. Instructor for continuing education sessions for professional tax preparers.
- Spring semester 1990 – Williamsport campus of Penn State University, Williamsport, PA. Instructor for introductory financial accounting course.

### **Small Business**

- 1989 to 2003 – Owned and operated (part-time) a business selling computer printer supplies.
- 1979 to 1980 – Owned and operated a custom auto parts store.

### **Economic Development**

- 1984 to 1986 – Loan packager with a regional economic development agency. Duties included assisting businesses in obtaining financing through several government programs.

## Education

B.S. in Business Administration, Bloomsburg University, PA, May 1976. Graduated with Honors. Majored in Accounting.

## Certifications

- Certified Public Accountant (CPA) since 1978. Licensed in PA. Applied for NJ license on June 27, 2008.
- Certified Valuation Analyst (CVA) since February 1997.
- Accredited in Business Valuation by the American Institute of Certified Public Accountants since February 2001.
- Certified in Financial Forensics (CFF) by the American Institute of Certified Public Accountants since September 2008.

## Professional Memberships

- American Institute of Certified Public Accountants.
- Pennsylvania Institute of Certified Public Accountants. Currently serving as President of the South Central Chapter.
- New Jersey Society of Certified Public Accountants
- National Association of Certified Valuation Analysts.
- American Society of Appraisers, Associate Member.

## Publications and Writing

- “The Do-It-Yourself Business Valuation Workbook,” self-published, 2009.
- “Guide to Selecting the Right Professional to Value Your Business,” self-published, 2009 & 2004.
- “Small Business Scorecard,” self-published, 2009 & 2004.
- “Business Valuation,” continuing professional education course for CPAs, published by Ultimate CPE, 2004.

## David E. Coffman CPA/ABV, CVA

- 2002 – BizActions, LLC. Wrote a series of 16 business valuation articles that were published in a nationally distributed newsletter.
- Article, “Why You Need a Planning System, Not a Business Plan,” published December 14, 2001, Central Penn Business Journal.
- Article, “Should Business Appraisers in Divorce Cases be Jointly Retained?” published October 2001, DivorceSource.com.
- Article, “Don’t Let Passions Rule When Buying a Business,” published December 1998, Northeast Pennsylvania Business Journal.
- Article, “Employee or Independent Contractor? Choosing Wrong Can Be Costly,” published by various regional business journals, from September 1994 to February 1995. Also published by Recharger Magazine, October 1994.

## Presentations

- “How to Determine Your Business’ Worth,” part of the Wells Fargo Business Insight Series Videos - <https://wellsfargo.imaginationdigitalmedia.com/business-insights/?episode=C8>
- “Forensic Accounting and Valuation in Divorce,” part of the “Successful Financial Settlements for Your Divorce Client” seminar by the National Business Institute, August 18, 2008 in Harrisburg, PA.
- “Exit Planning – Helping Small Business Owners Exit on Their Own Terms,” West Shore CPA Group, presented December 19, 2007 in Camp Hill, PA. Qualified for 1.5 hours of continuing professional education for CPAs.
- “The Impact of Global Economic Parity,” Proteus Futures Workshop, presented August 15, 2007 at the U.S. Army War College in Carlisle, PA.
- “Exit Planning – Helping Small Business Owners Exit on Their Own Terms,” Smith Barney, presented June 12, 2007 in Harrisburg, PA. Qualified for two hours of continuing professional education for CPAs.
- “Understanding Business Valuation – A Practical Guide,” Smith Barney, presented May 9, 2006 in Harrisburg, PA. Qualified for two hours of continuing professional education for CPAs.
- “Take Your Business Plan and Shred It,” Society for the Advancement of Management International Conference, presented April 8, 2006 in Orlando, FL.
- “How Will Greater Global Economic Parity Affect the U.S.?” World Future 2004, the annual conference of the World Future Society, presented August 1, 2004 in Washington D.C.
- “The Evolution of Employment,” WorldView 2002, the annual conference of the World Future Society, presented July 22, 2002 in Philadelphia.
- “Business Valuation Basics,” online workshop at AccountingWeb.com, presented June 12, 2001.

### New Jersey

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### Pennsylvania

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