

# CURRICULUM VITAE

## THOMAS V. KALAJIAN

### Summary of Integrated Financial Disciplines

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- **Cost and Managerial Accounting**
  - Cost and Profitability by Product, Service or Location to Prioritize Assignment of Resources
  - Analysis of Fixed and Variable Costs to Increase Flexibility for Surviving Market Changes
- **Income Tax Services**
  - Hand-crafted Income Tax Preparation for Minimizing Taxes and Audit Exposure for Personal and Business Entities
  - Proactive Planning and Guidance to Reduce Taxes, Reduce Audit Exposure and Avoid Penalties
- **Business Valuation**
  - Accredited Specialist in Non-litigation Business Valuations, including:
    - Acquisitions and Dispositions
    - Shareholder, Partner or Member Buyouts
    - Buy/Sell Agreements
    - Business Appraisal Review to Render an Opinion on the Credibility of Business Appraisals of Other Appraisers
- **Business Development Advisory Services**
  - Transformational Strategies for Attaining and Sustaining Growth and Prosperity in a Disruptive Business Environment
  - Improvement in Profitability and Stability of Profit
  - Increased Amount and Stability of Cash Flow
  - Reduced Dependence on Owners Distracted by Continual Crisis Management
  - Increase in Equity Value Through Reduced Company Risk Profile and Increased Cash Flow
- **Business Transition Advisory Services for Transitioning Owners**
  - Systems and Strategies for Maximizing Business Value and Negotiation Advantages
    - Reducing Company Risk Factors Affecting Cash Flow
    - Improving Internal Systems, Procedures and Practices
    - Establishing Systematic and Sustainable Growth Initiatives
    - Stabilizing Revenue and Profitability
    - Reducing Reliance on Business Owners
    - Improving Operational and Administrative Throughput
    - Proactive Assistance in Establishing Industry Dominance Through Redesign of Customer Service and Team Development
    - Establishment of Systems to Remain in Contact with Customers and Team Members to Address their Changing Needs and Preferences
- **Strategic Life Insurance Services**
  - Funding for Liquidity Needs of Estates
  - Funding for Business Buy/Sell Agreements
  - Tax-free Accumulation of Wealth Through Whole-Life Instruments
  - Strategic Client-Centered Emphasis for Assessing Needs and Capturing Opportunities

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## Professional Qualifications

### **Chronology of Professional Credentials and Licensure**

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- **ABAR**, Accredited in Business Appraisal Review, *National Association of Certified Valuers and Analysts*, 2010 -
- **CVA**, Certified Valuation Analyst, *National Association of Certified Valuers and Analysts*, 1998 -
- **CRTP**, CTEC Registered Tax Preparer, *California Tax Education Council*, 2001 -
- **AFSP**, Annual Filing Season Program, *Internal Revenue Service (IRS)*, 2014 -
- **Registered Tax Preparer**, *Internal Revenue Service (IRS)*, 2014 -
- **Life Agent**, *Life License, State of California*, 2009 -

### **Chronology of Specialized Educational Achievements**

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- **Subscribing Member**, Business Transformational Strategies, *Panalitix USA*, 2016 - 2018
- **Graduate**, Advanced Business Development Workshop, *Focus Group*, circa 1998
- **Graduate**, Results Revisited, Updated Business Development Workshop, *Results Accountants Systems*, 1996 - 1997
- **Graduate**, Accountants' Boot Camp, *Results Accountants' Systems*, 1995
- **Graduate**, Training program for business development services to physicians, Mayer, Hoffman, McCann, P.C., Certified Public Accountants, Kansas City, MO, circa 1991
- **Graduate**, Executive Leadership Series, *Orange County Forum*, circa 1992

### **Professional Honors and Awards**

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- **Best Accredited in Business Appraisal Review Report Award for 2010**, *The Institute of Business Appraisers*, 2010

### **Publications**

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- *Introduction to Business Valuation Concepts for Attorneys*, Family Lawyer Magazine, (Divorce Marketing Group, Toronto, Ontario, Canada) November 2012

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- *Introduction to Business Valuation Concepts for CPAs*, The Successful California Accountant, (Society of California Accountants, Santa Rosa, CA), Fall 2004
  - *How to Improve the Profitability of Your Business*, self-published guide, second edition, 2004

## Educational Qualifications

### University Education

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**GRADUATE**, *Bachelor of Science, Business Administration, Concentration in Accounting*, California State University, Northridge, California, 1971

## Public Speaking and Presentation Experience

### Toastmasters International Public Speaking Education and Accomplishments

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- Cofounder of club #3442 in Tustin, California
- A Speechcraft presenter
- Club positions held
  - President
  - Vice President of Education
  - Treasurer
  - Vice President of Public Relations
- Accomplishments, Awards and Distinctions
  - Program completion for Competent Toastmaster (CTM)
  - A best evaluator award at an Area speech contest
  - Master of Ceremony's at Regional speech contest
  - Area Governor appointment (nomination declined due to time constraints)

### Television Broadcasting

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- **OCN**, *Orange County 24-hour cable news channel tax and management guest correspondent, 1991 - 2001*
  - Live-to-tape presentations, self-scripted, in studio
  - Live-to-tape presentation, interview format, on site in offices
  - Live and live-to-tape presentation, panel member for telephone call-in format

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- Channel 13, UPN, *Los Angeles local commercial television, tax guest correspondent, 1999*
    - Live to tape presentation, interview format, on site in offices

### **Professional Speeches, Seminars and Multi-media-based Workshops Authored, Developed and Presented**

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- “32 Ways to Boost Your Bottom Line”
- “Quality Service: What It Is and How to Deliver It”
- “Cash or Accrual Accounting: Which Is Better and Why?”
- “Boosting Your Bottom Line: Beyond the Bean Counting Mentality”
- “Fundamental Business Factors in Successful Private School Administration”
- “Clinton’s Tax Law Changes: What They Mean for You and Your Business”
- “Target Marketing: How to Pick Your Customers and What to Expect”
- “Ten Steps to Optimizing Revenue in a Medical Practice”
- “Detecting and Preventing Employee Embezzlement”
- “Delivering Awesome Service”
- “Phone Right - Optimizing Prospect Conversion Rates for Incoming Callers”
- “The Key Leverage Points in Your Profit Improvement Potential”
- “Recognizing New Opportunities in the Challenges of Change”
- “Getting Your Business to Work for YOU”
- “Professional Public Presentation Rules and Tips”

### **Seminar, Speech and Multi-Media Based Workshop Hosts and Sponsors**

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- Irvine Chamber of Commerce
- Orange Chamber of Commerce
- Montebello Chamber of Commerce
- Orange County Association of Private Schools
- Sanwa Bank
- Metro Bank
- Sun West Bank
- Santa Ana Chamber of Commerce
- Wells Fargo Bank
- Hoag Hospital
- St. Joseph Hospital

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## Memberships and Associations

### **History of Principal Professional and Business Memberships**

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- American Institute of Certified Public Accountants (AICPA)
- American Mensa, Ltd.
- California Society of Certified Public Accountants (CSCPA)
- Center for Economic and Industry Research (CEIR)
- National Association of Certified Valuation Analysts (NACVA)
- Orange County Armenian Professional Society
- The ESOP Association
- The Institute of Business Appraisers (IBA)
- The Medical Group Management Association (MGMA)
- The National Center for Employee Ownership (NCEO)

## National, Civic, Community and Charitable Activities

### **Charitable and Community Volunteer Activities and Positions**

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- **Trex Fraternity, Orange County Chapter:** Charitable organization fund raising event, videography of annual picnic of setup, guests and activities, established for fundraising contributions to local charities; video production intended for prospective marketing on social media platforms to increase attendance, Mason Regional Park, Irvine, California, July 24, 2016
- **Saddleback College, College FM Radio Station KSBR:** Community fundraising event, KSBR Birthday Bash, annual Orange County outdoor jazz musical concert, videography of artist interviews backstage, footage behind the scenes, guests and volunteers, event date May 2016, air date August on Saddleback TV station 39, August 2016
- **St. Wilfrid's Episcopal Church:** Videography of baptism services for church promotion opportunity for both publication on church web site and social media video platforms, Huntington Beach, California, November 2014 - January 2015
- **St. James Armenian Church:** Charitable organization fundraising event, location videography of church picnic and events, interviews with key organizers, Montebello, California, September 2014
- **ASCCA, Orange Coast Chapter 50, Orange County (Automotive Service Councils of California):** Industry association event, videography of dinner meeting speaker

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- presentations, participant responses and interviews testimonials of members, Newport Beach, California, November 2013
- **American Cancer Society Relay for Life:** Charitable organization fundraising event, videography interviews with principal organizers of Zumbathon & Fundraiser Event, Mission Viejo, California, April 2013 (unpublished)
  - **Trex Fraternity, Orange County Chapter:** Charitable organization community outreach program, videography of annual “Ice Cream Social,” serving ice cream, cake and punch for the resident clients of **Fairview Development Center**, California Department of Developmental Services, Costa Mesa, California, January 2013
  - **The John Bilezikjian Foundation:** Charitable organization fundraising concert, “The Magic of John Bilezikjian,” principal financial support, event planning and videography interviews of principal musicians backstage preceding the concert at the La Mirada Performing Arts Theater, La Mirada, California, August 2011
  - **Armenian Festival of Orange County:** Founding member of executive committee in establishing structure, mission, vision, annual event structure, operations, quality control, customer interface and surveys, public relations, marketing and event videography for multiple years, Laguna Hills, CA, 2005 - 2012
  - **Orange County Bar Foundation:** *Golf Tournament Steering Committee for **Shortstop Program**, Irvine, California, October 1999*
  - **The Flo-Jo Memorial Community Empowerment Foundation:** *Golf Tournament Steering Committee, since 1999*
  - **Wish Sports Foundation:** *Golf Tournament Steering Committee for **CHOC** (Children’s Hospital of Orange County), Newport Beach, California, March 2000*
  - **Angels Within, Inc.:** *Rock Concert Steering Committee, **Juden and Friends**, in coordination with Major League Baseball, Las Vegas, Nevada, February 2000*

### **University Guest Lecturer, Educational Programs**

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- **Chapman University, School of Film and Television,** *Recurring annual guest lecturer on Professional Public Speaking, Master of Ceremonies and Presentation Skills for Broadcast Journalism students, 2001 - 2016*
- **Edgewood Private School,** *Theater lighting set-up and operation, 1993 - 1998*
- **Fairmont Private School,** *Theater lighting set-up and operation, 1999 - 2000*
- **Ferrahian Armenian High School,** *Non-accredited elementary bilingual school teacher, English and Mathematics, for immigrant children from Armenia, 1965 -1967*

### **Board of Advisor Memberships / Directorships / Executive Council Memberships / Committee Memberships**

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- **Armenian Genocide Pledge Drive, Orange County PBS station KOCE-TV, Community Planning Coordinator, March 29, 2007**
- **Armenian General Benevolent Union, Orange County, Committee Member, 2006 -**
- **PreservePro, Inc., Board of Advisors, 2005 - 2007**
- **Armenian Festival, Inc., Organizing Committee, Planning Coordinator, Annual Orange County Armenian Festival, 2005 - 2012**
- **Orange County Armenian Professional Society, Executive Committee, Public Relations, 2005**
- **Orange County Small Business Network, Director, 2001**
- **The Flo-Jo Memorial Community Empowerment Foundation, Steering Committee, Director, 1999 - 2001**
- **Ability Plus School, Director, circa 1983 - 1989**
- **Garden Grove Community Bank, Advisory Board, circa 1983 - 1985**

### **Support for Cultural and Community Organizations**

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- Orange County Performing Arts Center
- Ararat Home for The Aged
- Armenian Relief Society, *Earthquake Fund*
- Armenian General Benevolent Union
- Japanese Earthquake Fund

### **Civic Awards and Achievements**

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**Nominee, Businessman of the Year, Santa Ana Chamber of Commerce, 1992-1993**

## Federal Licensure and Military Service

### **Civilian Federal Licensure**

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**Technician Class Amateur Radio License**, *Federal Communications Commission*, license call sign, **WA6JAM**, (*at age 14*) 1959 - 1963

### **Fulfillment of Military Duty**

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**U.S. Army**, *Noncommissioned enlistee*, Non-combat duty, U.S. Army Signal Corps

- Drafted, June 1967, regular draftee enlistment period
- Reenlisted, regular Army, July 1967 for regular enlistment period
- Boot camp completion at Ft. Bliss, El Paso, Texas, 1967
- Graduate, multiplex radio equipment repair, Ft. Monmouth, Monmouth, New Jersey, 1968
- Promoted to qualify for advanced multiplex radio repair course, Ft. Monmouth, New Jersey, 1968
- Graduate, advanced course in multiplex radio equipment repair, Ft. Monmouth, New Jersey, 1968
- Promoted to Specialist Fourth Class upon graduation from Signal Corps School, Ft. Monmouth, New Jersey, 1968
- Promoted to Transportation Coordinator, Signal Corps, I Corps Sector, Headquartered in Nha Trang, South Viet Nam, 1968
- Honorable discharge, 1969