



J. DAVID HARPER, CPA/ABV/PFS/CFF, CBA, CVA

BACKGROUND

- CPA (Certified Public Accountant) – State of Florida, State of Georgia
- ABV (Accredited in Business Valuation) – American Institute of Certified Public Accountants
- PFS (Personal Financial Specialist) – American Institute of Certified Public Accountants
- CFF (Certified in Financial Forensics) – American Institute of Certified Public Accountants
- CBA (Certified Business Appraiser) – Institute of Business Appraisers
- CVA (Certified Valuation Analyst) – National Association of Certified Valuators and Analysts
- Financial Neutral – Advanced Trainings in Collaborative Process through the IACP
- Former General Securities Representative (Series 7 Licensed) and Investment Advisor Representative (Series 66 Licensed) – Financial Industry Regulatory Authority

EDUCATION

- University of Virginia – Master of Science in Accounting
- Auburn University – Bachelor of Science in International Business; Finance Concentration
 - Summa Cum Laude; Honor Societies: Mortar Board and Phi Kappa Phi

RANGE OF EXPERIENCE

- Provided litigation support services to over 50 law firms in Tampa Bay and the surrounding areas
- Expert witness testimony at hearings, trial, depositions: Pinellas, Hillsborough, Pasco, & Lee counties
- Litigation support services including:

Expert witness testimony	Joint expert – litigation
Court-appointed expert – forensic accounting	Financial neutral – collaborative

- Business valuation, forensic accounting, and/or financial consulting in the following areas:

Marital dissolution and other family law issues	Collaborative law
Criminal investigations – grand theft, fraud	Shareholder disputes/transitions
Gift and estate tax valuations, trust accountings	Equitable distribution
Corporate and individual tax strategies	Business transactions
Pension benefit plans, QDRO calculations	Equity compensation strategies
Business and succession planning	Audit and accounting
Retirement savings and life insurance plans	Funds tracing & financial modeling

PROFESSIONAL AFFILIATIONS

- American Institute of Certified Public Accountants
- Institute of Business Appraisers
- National Association of Certified Valuators and Analysts
- International Academy of Collaborative Professionals
- Tampa Bay Academy of Collaborative Professionals (Board Member)
- Collaborative Divorce Institute of Tampa Bay (Former Board Member)

LECTURES/PRESENTATIONS GIVEN

- Clearwater Bar Association Collaborative Law Section – The Role of the CPA in Collaborative Cases
- Tampa Bay Collaborative Trainers (co-trainer) – Collaborative Two-Day Basic Training
- Florida Academy of Collaborative Professionals – 2016 Statewide Conference Presentation: Four Dysfunctions of the Collaborative Team
- The Canakaris American Inn of Court – Avoiding Pitfalls in Equitable Distribution
- Collaborative Divorce Institute of Tampa Bay (Sarasota) – Expanding the Pie in Collaborative Cases
- University of South Florida – Assessing Business Value and Key Value Drivers
- University of South Florida – Business Valuations and Financial Metrics
- University of South Florida – Panel Discussion: Financial Metrics, Tax & Financial Strategies
- Collaborative Divorce Institute of Tampa Bay (Tampa)– Financial Basics in Divorce
- Tampa Bay Association for Marriage and Family Therapy – Collaborative vs. Litigated Divorce
- Collaborative Divorce Institute of Tampa Bay – Marketing Collaborative Divorce
- White Horse Advisors – Executive Compensation and Tax Strategies
- Tatum LLC – Employee Compensation and Benefits Retention Strategies

PUBLICATIONS

- Champions of Collaborative Divorce Edited by Joryn Jenkins (chapter author): “The Three Virtues of a Highly Effective Collaborative Team Member”
- Building A Profitable and Successful Collaborative Law Practice Edited by Forrest (Woody) Mosten and Adam B. Cordover (chapter author): “Traits of a Highly Effective Financial Neutral”

PROFESSIONAL AND BUSINESS HISTORY

- Harper Forensic CPAs 5/2013 – Present
- Brauer & Harper CPAs (f/k/a: Scott A. Brauer, CPA, PA) 8/2009-4/2013
- Retirement Capital Group (financial analysis/consulting, business valuation) 1/2004-7/2009
- Ernst & Young (Assurance and Advisory Business Services) 6/2001-12/2003