ELMER (PETE) LEWIS, MBA, EA

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SPECIFIC AREAS OF EXPERTISE INCLUDE:

- Federal and multi-state income tax preparation for individuals
- Federal and multi-state income tax preparation for C-Corporations
- Federal and multi-state income tax preparation for Partnerships and LLCs.
- Federal and multistate income tax for Trusts and Estates
- Business Valuations and Expert Witness for Divorce
- IRS Debt Relief – Offer In Compromise

EXPERIENCE

Lewis & Associates Tax Planning, Inc., 525 Dunham Road, Suite 9, Saint Charles, Ill. **January 2008 to Present**
Principal in tax consulting firm which offers:

- Business Income tax preparation
- Personal Income Tax Preparation
- IRS audit representation
- IRS debt relief for businesses and individuals.
- Business Valuations for Closely held entities (i.e. Expert witness for divorce, buy-sell strategies, etc.).
  See website at: ***https://www.taxadvisorstcharles.com***

Public Accounting/Law Firm Consulting

- Johnson, Harkness & Parker CPAs- Tax Preparer — Feb 2016 – April 12th 2016
- Colombik & Associates PC – Senior Tax Consultant — Jan 2000 - December2003 (see details below)
- Glenn Ingram & Company, Ltd – Tax Consultant — Feb – April,1998
- Arthur Andersen Consulting, LLP - Tax Consultant — Nov 1997- Jan. 1998
- Donald McLean & Co., Chtd - Tax Manager — Dec. 1995 – Dec. 1996
- Grant Thornton, LLP- Tax Consultant — Jan. – April 1995

Corporate Tax Consulting

- Broadwind Energy, Inc. – Tax Consultant — June – October 2012
- Waste Management, Inc. – Tax Consultant — June –September 1994
- Katy Industries, Inc.- Tax Consultant — August 1993 – June 1994

Wolters Kluwers (Commerce Clearing House, Inc), Riverwoods, Ill. **September 2010 to January 2012**
Tax Writer/Analyst
Wolters Kluwer (www.wolterskluwer.com) is a market-leading global information services company in the areas of legal, business, tax, accounting, finance, audit, risk, compliance, and healthcare. Wrote, analyzed and researched federal income tax regulations (Tax & Legal Editorial Department) for corporations, individuals and trusts in the following publications: CCH Master Tax Guide, Practical Tax Professional (Federal Tax Guide) Tax Preparation Partner Series, 1040 Express Answers and bi-weekly Practical Tax Bulletin.

Ulta Salon, Cosmetics & Fragrance, Inc., Romeoville, Ill**.** **January 2006 to April 2008**
Director of Tax
Initiated tax planning for this $1B public company retailer as follows:

- Implemented new tax department to keep pace with rapid business expansion into nationwide public company markets (IPO).
- Responsible for ASC 740 (FASB 109), FIN48, calculation of annual tax provision and Sarbanes-Oxley compliance for the tax department
- Provided tax planning and research opportunities to Board of Directors and Audit Committee.
- Researched and developed all tax minimization strategies and personal tax planning for foreign shareholders - U.S. source income.
- Supervised tax preparation processes for sales/use, personal property tax, multistate income tax, federal income tax, payroll tax and miscellaneous local business taxes.
- Supervised all tax audits initiated by federal income, personal property, and multistate income and sales/use tax authorities.
- Preparation of tax footnote in SEC filing of Forms 10K, 10Q and calculation of annual tax provision.

Parson Consulting, Chicago, Ill. **January 2004 to January 2006**
Lead Sarbanes-Oxley Consultant
Supervised audit teams which successfully remediated internal control weaknesses in Sarbanes-Oxley (SOX) Section 404 documentation for the following corporations:

- **Shell Oil Company in** Oslo, Norway (contracted through Parsons Consulting Group).
- **Harris Bank,** Chicago and Canada (contracted through Robert Half Management Resources, Inc.).
- **SPSS, Inc.,** a software developer; audited locations in London, England and Chicago, Illinois (contracted through Robert Half Management Resources, Inc.).
- **Viacom Outdoor,** a subsidiary of Viacom Productions; audited locations in Dallas and Houston Texas, Atlanta, GA., and Chicago, Illinois. (Contracted through Ajilon Finance, Inc.).

Colombik & Associates PC, Itasca, Ill. **January 2000 to December 2003**
Director of Tax Planning
Senior Tax Consultant for a $15 million law firm specializing in tax and business advisory services to high net worth individuals, small business corporations, partnerships and limited liability companies.

- Reviewed and prepared U.S. and Illinois tax compliance for Simple and Complex Trusts (i.e. Form 1041. IL-1041)
- Reviewed and prepared estate tax returns for high net worth individuals (Form 706 and schedules)
- Reviewed and prepared federal and multi-state income tax returns for S Corporations, C Corporations, trusts, partnerships and estates as requested by clients. Filed in 40 states.
- Top performer in tax planning and savings implementations
- Performed tax reviews and due diligence for mergers and reorganizations.
- Supervised staff of three in house (i.e. researcher, tax writer and administrative assistant)
- Assisted with client planning for tax free mergers pursuant to IRC 368 (type A.B and C spinoffs).
- Assisted with client planning for tax free incorporations for C Corps, S Corps, LLCs pursuant to IRC 351, 355.
- Reviewed and prepared Canada GST (sales/use tax) and Quebec QST (sales/use tax).

Gabriel, Inc., Elgin, Illinois ($20 million automotive equipment manufacturer). **June 1989 - May 1992**
Tax Consultant

- Responsible for filing S corporation tax return for holding company and two subsidiaries in manufacturing and distribution of after- market auto parts.
- Converted the accounting system from manual to automated (MAS 90 general ledger system). Supervised a staff of four.
- Responsible for cash management of $10 million investment portfolio which consisted of SBA unit pools, mutual funds (i.e. interest rate tracking, ROI calculations, amortization of premiums and discounts on bonds, monthly cash flow projections.)
- Supervised five month IRS audit. Defended tax position on behalf of FASB 13 treatment which resulted in tax savings of $250,000.

EDUCATION

MBA, Finance, Dominican University, River Forest, IL
MS, Accounting courses, Roosevelt University, Chicago, IL
BS, Journalism, Southern Illinois University, Carbondale, IL
EA (Enrolled Agent Admitted to Practice Before IRS)

ADJUNCT TEACHING EXPERIENCE

Adjunct Professor of finance, accounting and business management evening courses at DePaul University, University of Phoenix (On ground) all in the Chicago area. **From September 1998 to 2018**

SPEAKING ENGAGEMENTS

2014 – present — **SCORE – Chicago,** Chicago Illinois. A resource partner of the Small Business Administration (SBA) dedicated to helping small business start-up and grow.

2013- present — **Lorman Education Services**, Milwaukee, WI**.** A provider of continuing professional education (CPE) and (CLE) credits to licensed certified public accountants and lawyers.

2010-2011 — **PESI** (Professional Education Systems, Inc.) – **Law, Inc.,** Eau Claire, WI., a provider of continuing professional education (CPE) and (CLE) credits to licensed certified public accountants and lawyers.