



CERTIFIED PUBLIC ACCOUNTANTS & CONSULTANTS SINCE 1939

SPEAKER MEDIA KIT



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| About KROST

Established in 1939 in Pasadena, California, KROST is a full-service Certified Public Accounting and Consulting firm serving clients across various industries. Our focus is recognizing opportunities and creating value for our clients by equipping them with the tools to make better business and financial decisions for the future.

We render all the traditional services you might expect from a Certified Public Accountant firm with an emphasis on recognizing opportunities and solving problems and concerns before they become an achieve your goals. While critical thought is important, follow through is the key to success.

As one of the oldest local firms in Pasadena, we understand that quality service starts with quality people. Our bright, energetic team of professionals has acquired the knowledge and expertise necessary to provide sound advice to our clients in any situation.

We are pleased to have been recognized as one of the Top Accounting Firms by the Los Angeles Business Journal. The LABJ lists comprehensive company and top local executive contact information, detailed company data, rankings of leaders across every market sector and much more. We have also been listed as the Fastest Growing Firm in the country, Top 100, and Top Regional Leaders in the West by Accounting Today. Accounting Today's Top 100 Firms and Regional Leaders is an annual ranking that recognizes the largest tax and accounting firms by revenue, both nationwide and in specific regions. Additionally, INSIDE Public Accounting (IPA) named us one of the Top 100 Firms, Fastest-Growing Firms, and Best of the Best Firms. IPA uses a proprietary formula to rank Best of the Best firms based on more than 70 metrics covering everything from training and turnover to costs and compensation.

Our firm has speakers that are frequent lecturer to large organizations such as the California Society of CPAs, American Institute of CPAs, the California Restaurant Association, and conferences such as the Accounting & Finance Show. We have given many seminars on cost segregation, Mergers & Acquisition and restaurant matters to CPAs, attorneys and industry professionals.

KROST Course Catalog

As educators in the field since 1939, our firm has assisted thousands of businesses and individuals reach their financial goals. Our team of professionals has acquired the knowledge and expertise necessary to provide sound advice in any situation. The following is a listing of all of our industry topics. Please contact Anna Chen at anna.chen@krostcpas.com for more information on a particular course topic.

M&A TECHNOLOGY TRENDS AND HIGHLIGHTS



The greatest challenge facing technology companies today is fulfilling the needs of its customers while remaining ahead of its competitors. Rapid change in technology advancements means companies must consistently invest in research and development. This session will provide a review of the major activities in the M&A and Capital markets for US Technology.

- Companies in 2019 including IPOs
- Venture Capital trends and
- Hot tech sectors such as AI and Blockchain

1 Hour

TAX DEFERRED EXCHANGES OF REAL ESTATE



Cost segregation and Tax Deferred Exchanges of Real Estate under IRC 1031 are two of the most valuable tax planning concepts that a real estate owner can utilize today. This presentation will provide insights on how a taxpayer can utilize both effectively and maximize their tax deferrals. We will also go over in-depth examples and case studies.

- 1245 and 1250 property definitions
- Basis computations
- Recapture tax and its affects
- When an opportunity is optimal

1 Hour

KROST Course Catalog

continued

PROFORMA'S - PROJECTING THE FINANCIAL FUTURE OF YOUR RESTAURANT



Discuss the current success rate of restaurants and the primary reasons they don't succeed. In addition, we will review how proper planning and realistic model assumptions can help to establish an objective evaluation of your viability in the marketplace. Finally, we will highlight the necessary components of what constitutes a good business proforma and how it can benefit you going forward.

- Discuss the challenges of opening a new restaurant concept or additional location
- Define what a proforma is and how it is produced
- Highlight the value and utility of having a proforma and how it can influence you to make better business decisions

1 Hour

THE FUTURE OF TIPPING AND SERVICE CHARGES



One of the most challenging and controversial topics for restaurant owners/operators today is how to handle tips and service charges. The laws and regulations are in flux constantly, as are the strategies today's chefs and owners are employing to create a more merit-based environment and deal with the increasing minimum wage.

This session is designed to provide a clear understanding of the differences between a "tip" and a "service charge." In this seminar, we will cover these topics and talk about other practices and solutions to help you make the best decisions for your restaurant and your staff.

- To help restaurateurs navigate the latest landscape of tips and service charges
- Avoid the pitfalls
- Stay compliant
- Create the most value for them and their employees

1 Hour

KROST Course Catalog

continued

ROLE OF BOARD DIRECTORS IN M&A TRANSACTIONS



We will explore a number of key issues including legal, business, operations, administration, human resources, benefits, intellectual property, and financial issues. Board directors are essential to a smooth transaction as they can significantly assist the company in three major areas:

- Sourcing and structuring the deal
- Providing oversight on the due diligence process and guidance to prepare the company for the deal
- The valuation, timing, due diligence process
- Need for a good team—legal, banking, and tax
- The role of intellectual property
- The acquisition agreement provisions

1 Hour

FOOD FOR THOUGHT: MENU COSTING & ANALYSIS



Join us as we dive into the basic concepts of menu costing and the components necessary for this process. We will explain why menu costing and analysis is an essential step in properly managing restaurant operations. Learn recipe building options including cutting-edge software solutions. Get an overview of purchasing and receiving best practices, and how to set up appropriate ordering by establishing a trusted par-based system. Lastly, come away with an understanding of how to accurately track your purchases and work against a budget with the help of valuable ongoing systems.

- Learn the basics of how to perform menu costing and analysis, and its benefits
- Understand the relationship between purchasing, inventories, production, and food costing
- Discover tools and systems to help maximize profitability and productivity through menu analysis

1 Hour

KROST Course Catalog

continued

PPP FORGIVENESS APPLICATION REVIEW SERVICE FOR LENDERS AND BORROWERS



Since the CARES Act passed into law in March, there have been new laws, multiple rule publications, and over 50 FAQs released by the SBA. KROST's subject matter experts have kept up-to-date with these changes to ensure that its clients are abiding by these rules.

KROST is now using this expertise to provide a PPP Loan Forgiveness Review Service for lenders and borrowers. This will involve independently checking all the calculations made by the borrower as part of the forgiveness application, including eligible expenses, full-time equivalent employees, and salary/hourly wage reductions to ensure compliance with SBA rules. In addition, KROST will review the supporting documentation provided by the borrower for verification.

- Learn about the KROST PPP Loan Forgiveness Review Service for lenders and borrowers
- How it addresses the forgiveness process in a timely and efficient manner
- Compliance with the SBA's rules and guidance.

1 Hour

THE EMPLOYEE RETENTION CREDIT: A VALUABLE ALTERNATIVE TO EMERGENCY LOANS



Informative session provides the latest guidance on applying for the Employee Retention Credit (ERC). The credit, equal to 50% of the first \$10,000 of "qualified wages" paid by an "eligible employer," could be a valuable alternative for those who either did not apply or did not qualify for PPP and other emergency loans. The session will focus on who is eligible for the credit, how to compute the amount of the credit, how to claim the credit, and how it interacts with other benefits provided by the CARES Act.

- Latest guidance on the Employee Retention Credit (ERC)
- Who is eligible for the credit
- How to compute the amount of the credit
- How it interacts with other benefits provided by the CARES Act.

1 Hour

KROST Course Catalog

continued

HOLD ONTO YOUR PROFITS: IDENTIFYING AND CONTROLLING RESTAURANT SHRINKAGE, WASTE & THEFT



We will discuss the devastating effects of shrinkage, waste and theft on your business, and the three reasons why you need to be proactive. In addition, we will highlight operational strategies to combat and prevent these issues as well as recommend ongoing systems and practices to avoid in the future.

- Define the types of loss that occur in the restaurant
- Identify which forms are likely taking place
- Suggest practical operational solutions and recommend systems to discourage and prevent in the future

1 Hour

EMERGENCY LOAN PROGRAMS FOR ECONOMIC RELIEF



This session will cover the latest update on the state and national emergency loans available for small to medium-sized businesses (under 500 employees). After an informative session on the loan options.


- The Economic Injury Disaster Loan (EIDL) Program vs The Paycheck Protection Program (PPP) – Comparison Chart
- Overview of Coronavirus Aid, Relief, and Economic Security (CARES) Act
- Difference between SBA loans – PPP loans, EIDL loans, non-disaster SBA 7(a), 504 and microloans, and also receive investment capital from Small Business Investment Corporations (SBICs).


1 Hour



Jason C. Melillo, CPA

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ABOUT ME

Jason Melillo is the CEO of KROST and a Principal of KBKG, Tax Credits, Incentives, and Cost Recovery. Previously, Jason was the practice leader of the Accounting and Advisory & Assurance Services practices. Jason has been a lecturer to large organizations such as the California Society of CPAs, the American Institute of CPAs, and organizations such as the California Restaurant Association. He has given many seminars to certified public accountants, attorneys, and industry professionals.

EXPERIENCE

- Author - "What You Need to Know About Cybersecurity"

SPEAKER FEATURED IN

- California Society of CPAs Education Foundation and discussion groups
- Lorman Education Services

EXPERT SUBJECT MATTER TOPICS

- Tax
- Accounting
- Assurance & Advisory
- Manufacturing & Distribution
- Real Estate
- Corporate Tax Incentives

PROFESSIONAL AFFILIATIONS

- CALIFORNIA SOCIETY OF CPAS
- AMERICAN INSTITUTE OF CPAS
- LECTURER — LORMAN EDUCATION SERVICES
- LECTURER — PASADENA BUSINESS & TECHNOLOGY CENTER


EDUCATION


UNIVERSITY OF SOUTHERN CALIFORNIA
BACHELOR OF SCIENCE, FINANCE AND BUSINESS
ECONOMICS



Gregory A. Kniss, CPA

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ABOUT ME

Gregory Kniss is the Chairperson for KROST and KBKG. Greg has been actively involved with the firm's business consulting and tax practice for over 40 years.

Early in his career, Greg expanded and later became Principal in charge of the firms' restaurant industry practice which has been one of the largest industry niches within the firm.

EXPERIENCE

- Author for LA Business Journal: "State of Accounting – Points of View from the Accounting Leaders" Desks. The Future of the CPA Profession: What Firms Need to Do to Keep Up"

SPEAKER FEATURED IN

- PPC's Guide to Restaurant and Bars

EXPERT SUBJECT MATTER TOPICS

- Tax
- Corporate Tax Incentives
- Accounting
- Mergers & Acquisitions
- Technology

PROFESSIONAL AFFILIATIONS

- CALIFORNIA SOCIETY OF CPAS
- AMERICAN INSTITUTE OF CPAS
- CALIFORNIA RESTAURANT ASSOCIATION
- NATIONAL RESTAURANT ASSOCIATION


EDUCATION


CALIFORNIA LUTHERAN UNIVERSITY
BACHELOR OF SCIENCE, BUSINESS ADMINISTRATION



Paren Knadjian

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ABOUT ME

Paren Knadjian is the Principal of the M&A and Capital Markets group at KROST. He comes with over 20 years of experience in mergers and acquisitions as well as equity and debt financings. In that time, Paren successfully completed over 200 transactions acting as a both a buy-side and sell-side advisor, as well as a broker/dealer. He also has 15 years of experience as a C-Level executive in several high-tech companies.

EXPERIENCE

- Speaker - "Role of Board Directors in M&A Transactions"
- Speaker - "M&A Technology Trends and Highlights"
- Author - "FinTech M&A and Market Report"
- Author - "Southern California M&A in Manufacturing Report"
- Author - "M&A Trends in The Media, Entertainment, and Gaming Industries:"

SPEAKER FEATURED IN

- Private Directors' Association
- Accounting & Finance Show Los Angeles

EXPERT SUBJECT MATTER TOPICS

- M&A and Capital Markets
- Buy-Side Transactions
- Sell-Side Transaction
- Technology
- Financial Services

PROFESSIONAL AFFILIATIONS

- REGISTERED BROKER/DEALER, FINRA
- ASSOCIATION OF CORPORATE GROWTH


EDUCATION


BACHELOR OF SCIENCE, UNIVERSITY OF BRISTOL, UK
ROYAL MERCHANT NAVAL SCHOOL, UK



Jean Hagan

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ABOUT ME

Jean Hagan has owned, operated, and consulted in the restaurant industry for over 30 years. During that time, she worked with a well-known national chain, managed food and beverage for several ski facilities in Squaw Valley, and became the president, CEO, and shareholder of one of the highest grossing restaurants in California. Jean is Principal and leads the restaurant operations consulting practice at KROST.

EXPERIENCE

- Author - "The End of To-Go Supplies"
- Author - "Lunch Business – Old & New"
- Author - "Does the New Tax Code Affect Your Business?"

SPEAKER FEATURED IN

- The Future of Tipping and Service Charge Webinar
- Management: Operations, Systems & Financial Controls Webinar
- SoCal Restaurant Radio Show

EXPERT SUBJECT MATTER TOPICS

- Restaurant/Foodservice
- Restaurant Site Assessment
- Restaurant Business Accounting
- Restaurant Consulting

PROFESSIONAL AFFILIATIONS

- ADJUNCT PROFESSOR, CULINARY INSTITUTE OF AMERICA
- CALIFORNIA RESTAURANT ASSOCIATION
- NATIONAL RESTAURANT ASSOCIATION
- NEVADA COUNTY BOARD OF SUPERVISORS, MAC MEMBER/CHAIR


EDUCATION


VIRGINIA POLYTECH-BLACKSBURG
GRADUATE STUDIES IN POST HARVEST PHYSIOLOGY
DELAWARE VALLEY COLLEGE OF SCIENCES
BACHELOR OF SCIENCE, HORTICULTURE



Lou Guerrero, CPA, MBT

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ABOUT ME

Luis (Lou) A. Guerrero is Vice President of KROST CPAs & Consultants and is a co-founder of KBKG, Tax Credits, Incentives, and Cost Recovery consulting firm. As the Tax Practice department leader for KROST, Lou is responsible for the overall tax function of the firm and specializes in clients in the financial services sector (hedge funds, money managers, private equity), family office and high-net-worth individuals, real estate, food service (restaurants and related), technology (including manufacturing and distribution) and professional service firms.

EXPERIENCE

SPEAKER FEATURED IN

- California Society of Certified Public Accountants (CalCPA)

EXPERT SUBJECT MATTER TOPICS

- Tax
- Tax Specialty Services
- Financial Services Sector
- Real Estate

PROFESSIONAL AFFILIATIONS

- AMERICAN INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS (AICPA)
- CALIFORNIA SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS (CALCPA)
- PRIME GLOBAL
- CALIFORNIA RESTAURANT ASSOCIATION
- NATIONAL RESTAURANT ASSOCIATION


EDUCATION


GOLDEN GATE UNIVERSITY
MASTER IN BUSINESS TAXATION
CALIFORNIA STATE UNIVERSITY, CHICO
BACHELOR OF SCIENCE, BUSINESS ADMINISTRATION,
FINANCE AND ECONOMICS
UNIVERSITY OF CALIFORNIA, SANTA BARBARA
BACHELOR OF ARTS, ECONOMICS, EMPHASIS IN
ACCOUNTING



Keith Hamasaki, CPA

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ABOUT ME

Keith Hamasaki is passionate about empowering others so they can build a better future for themselves. He reveals these possibilities by bringing together a strong and cohesive team to provide his clients value-added experience through collaborative partnership. With nearly two decades of consulting experience, Keith specializes in audit and business advisory services to emerging and middle market companies.

EXPERIENCE

- Author - "Can OZ work for you? Accounting for Qualified Opportunity Zone Funds"
- Author for LABJ - "Eight Insights for CFO of the Year Awards"
- Author - "Trade Wars: A Whole New World"

SPEAKER FEATURED IN

- CalCPA – Los Angeles Chapter
- Pasadena City College

EXPERT SUBJECT MATTER TOPICS

- Accounting for Opportunity Zones
- Cybersecurity Risk Assessment Foundations
- Analytical Review of Financial Accounting
- Purchase Price Allocations
- Operating Leases

PROFESSIONAL AFFILIATIONS

- CALIFORNIA SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS (CALCPA)
- AMERICAN INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS (AICPA)


EDUCATION


CALIFORNIA STATE UNIVERSITY, NORTHRIDGE
BACHELOR OF SCIENCE, ACCOUNTANCY
BACHELOR OF SCIENCE, BUSINESS
ADMINISTRATION, EMPHASIS IN BUSINESS LAW



Evelyn Fernandez, CPA, MST

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ABOUT ME

Evelyn Fernandez is a Tax Principal at KROST. She has been in the public accounting profession for over 15 years. Her areas of expertise include tax planning and compliance for high net worth individuals, international entities and individuals, multi-state taxation, partnerships, S corporations, trusts, nonprofit organizations and entertainment businesses.

EXPERIENCE

- Author - "IC-DISC Tax Savings on Export Goods or Services"
- Co-Author - "The Basics of Virtual Currency"
- Author - "The Streamlined Offshore Disclosure Procedures"
- Author - "Changes in Reporting Requirements for Foreign-Owned Domestic Disregarded Entities"

EXPERT SUBJECT MATTER TOPICS

- Tax
- International Tax
- Manufacturing and Distribution
- Not-for-Profit

PROFESSIONAL AFFILIATIONS

- CALIFORNIA SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS (CALCPA)
- AMERICAN INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS (AICPA)
- TOASTMASTERS INTERNATIONAL


EDUCATION


GOLDEN GATE UNIVERSITY
MASTERS IN TAXATION
CALIFORNIA STATE UNIVERSITY-NORTHRIDGE
BACHELOR OF SCIENCE, ACCOUNTING AND FINANCE



Richard Umanoff, CPA, MBA

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ABOUT ME

Richard Umanoff is an Estate & Gift, Trust and Probate Principal at KROST. Richard's career spans over 45 years, with a concentration in taxation. His primary emphasis is estate and trust tax compliance, planning, estate administration, and probate court accounting. Richard's primary goal is to assist individuals and their attorneys to effectively transfer wealth while minimizing unnecessary estate, gift, and generation-skipping taxes.

EXPERIENCE

EXPERT SUBJECT MATTER TOPICS

- Tax
- Estate and Trust Tax Compliance
- Estate Planning
- Accounting

PROFESSIONAL AFFILIATIONS

- AMERICAN INSTITUTE OF CPAS
- CALIFORNIA SOCIETY OF CPAS
- LA ESTATE PLANNING COMMITTEE
- CONFERENCE PLANNING COMMITTEE, UCLA ANNUAL TAX CONTROVERSY CONFERENCE

EDUCATION


STATE UNIVERSITY OF NEW YORK AT BUFFALO
MASTERS OF BUSINESS ADMINISTRATION,
PROFESSIONAL ACCOUNTING


STATE UNIVERSITY OF NEW YORK AT BUFFALO
BACHELOR OF SCIENCE, ACCOUNTING AND FINANCE



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ABOUT ME

Douglas A. Venturelli is an Estate & Gift, Trust and Probate Principal at KROST. He has 45 years of experience in tax, estate, and business services. His main focus is federal estate and gift taxes. Doug consults with clients in the entertainment, legal, real estate and medical industries. Doug brings first-hand knowledge to his tax and consulting practice after working in the film industry for numerous years after graduating from Law School.

EXPERIENCE

- Co-Author - "Loan-Out Corporations: To Be Or Not To Be?"

EXPERT SUBJECT MATTER TOPICS

- Tax
- Sports & Entertainment

PROFESSIONAL AFFILIATIONS

- CALIFORNIA STATE BAR ASSOCIATION
- LOS ANGELES COUNTY BAR ASSOCIATION
- US TAX COURT

EDUCATION

LOYOLA LAW SCHOOL

JURIS DOCTOR


UNIVERSITY OF CALIFORNIA, LOS ANGELES


BACHELORS IN ENGLISH LITERATURE



Stacey Korman, CPA

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ABOUT ME

Stacey Korman is the Accounting Principal at KROST. She has extensive experience in assurance, advisory, and accounting services, with an emphasis on middle-market companies and high-net-worth individuals. She has spent her career managing audits, reviews, and compilation engagements. To support KROST clients during the pandemic, Stacey helped launch the firm's PPP Loan Assistance program, including the team's development of a unique calculator that optimizes loan forgiveness.

EXPERIENCE

EXPERT SUBJECT MATTER TOPICS

- Accounting
- Client Accounting Services (CAS)
- PPP Loans & Forgiveness

PROFESSIONAL AFFILIATIONS

- AMERICAN INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS (AICPA)
- NEW YORK STATE SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS (NYSSCPA)
- CALIFORNIA SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS (CALCPA)

EDUCATION

BARUCH COLLEGE IN NEW YORK

MASTER OF SCIENCE, TAXATION


PENNSYLVANIA STATE UNIVERSITY


BACHELOR OF SCIENCE, ACCOUNTING WITH AN
EMPHASIS IN BUSINESS LAW



So Sum Lee, CPA

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ABOUT ME

So Sum Lee is a Tax Principal at KROST. So Sum has over 25 years of experience in public accounting and has a wide range of experience in Taxation, as well as servicing high-net-worth clients. So Sum's area of expertise includes industries such as wholesale, real estate investments, and restaurants.

EXPERIENCE

EXPERT SUBJECT MATTER TOPICS

- Tax
- Real Estate
- Technology
- Hospitality
- COVID-19 - Real Estate

PROFESSIONAL AFFILIATIONS

- AMERICAN INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS (AICPA)
- CALIFORNIA SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS (CALCPA)
- REAL ESTATE ROUNDTABLE ASSOCIATES COUNCIL
- KROST REAL ESTATE INDUSTRY GROUP


EDUCATION


UNIVERSITY OF CALIFORNIA, LOS ANGELES
BACHELOR OF ARTS, BUSINESS ECONOMICS WITH A
MINOR IN ACCOUNTING



Brad Pauley, CPA

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ABOUT ME

Brad Pauley is a Tax Principal at KROST. Brad has over 25 years of experience providing tax advice, projection, and compliance services to clients in a variety of different businesses and industries. His areas of focus include high-net-worth individuals and their closely held businesses, including athletes, entertainers, service professionals, and owners/operators of real estate including like-kind exchanges.

EXPERIENCE

- Author - "Game-Changing Tax Matters for Athletes"
- Author - "California Sets Threshold for Sales Tax"

SPEAKER FEATURED IN

- A RARE Day

EXPERT SUBJECT MATTER TOPICS

- Tax
- Sports & Entertainment
- Hospitality

PROFESSIONAL AFFILIATIONS

- MEMBER OF AICPA
- MEMBER OF CALIFORNIA SOCIETY OF CPAS


EDUCATION


PEPPERDINE UNIVERSITY
BACHELOR OF SCIENCE, ACCOUNTING



Matthew Weber, CPA, MAcc

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ABOUT ME

Matthew Weber is a Tax Principal at KROST. He has been with the firm's tax practice since July 2015 and has worked in public accounting since 2010. Matthew's areas of expertise include federal and multi-state tax compliance and consulting for individuals, corporations, and partnerships. He serves clients in several industries, including financial services, real estate, entertainment, restaurants, technology, and manufacturing.

EXPERIENCE

- Author - "New Capital Gains Treatment for Carried Interests"
- Author - "The Qualified Small Business Stock Gain Exclusion"
- Author - "Donor-Advised Funds"
- Author - "The Tax Treatment of Cryptocurrency"
- Author - "Tax Treatment of Cryptocurrency Transactions"

EXPERT SUBJECT MATTER TOPICS

- Tax
- State and Local Tax
- Financial Services Sector
- Hospitality

PROFESSIONAL AFFILIATIONS

- AMERICAN INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS (AICPA)
- CALIFORNIA SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS (CALCPA)

EDUCATION

UNIVERSITY OF SOUTHERN CALIFORNIA
MASTER OF ACCOUNTING

DEPAUL UNIVERSITY

BACHELOR OF SCIENCE IN COMMERCE, EMPHASIS IN
ACCOUNTING