

## DAVID M. KAUFMANN, CPA

Member: American  
Institute of CPAs Tax  
Division & Colorado  
Society of CPAs

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## Curriculum Vitae

- 2003 - **Sole practitioner, David M. Kaufmann, CPA**  
Present Practice limited to income tax return preparation and tax planning for trusts, beneficiaries, individuals and estates. Mr. Kaufmann can also provide forensic accounting services.
- 1987 – **Denver Tax Software, Inc.**  
Present President  
General management, design and development of tax and financial planning software (see attached list)
- 1980 - **Sole practitioner, David M. Kaufmann, CPA**  
1992 Individual and small business tax return preparation and tax planning.  
Forensic accounting.
- 1978 - **Arthur Andersen & Co.**  
1980 Staff Accountant
- 1974 - **R. & M. Kaufmann, Inc.**  
1978 Factory Manager  
Engineer

### Education

1979 – 2008 Over 1,352 hours of continuing professional education.

University of Michigan  
Masters of Business Administration – 1973  
(Emphasis on finance and taxation)

Purdue University  
Bachelor of Science in Industrial Engineering – 1972  
Graduated With Distinction

Miami University, Oxford, Ohio  
Courses in Systems Analysis

## **Professional Affiliations**

American Institute of Certified Public Accountants – Tax Division

Colorado Society of Certified Public Accountants

## **Professional Speaking Engagements**

Speaker at eight hour class: University of Denver Law School Continuing Professional Education – How To Setup A “Paperless” Office (5/22/2007)

Speaker at eight hour class: University of Denver Law School Continuing Professional Education – How To Setup A “Paperless” Office (10/19/2007)

Speaker at one hour Webcast: The CPA Technology Advisor - Move Your Firm One Step Closer to Paperless (11/13/2007)

Speaker at eight hour class: University of Denver Law School Continuing Professional Education – How To Setup A “Paperless” Office (5/28/2008)

Speaker at eight hour class: University of Denver Law School Continuing Professional Education – How To Setup A “Paperless” Office (10/30/2008)

## **Other Professional Designations**

Engineer-In-Training [first portion of the Professional Engineer certification) (1972)

Certified Public Accountant (1979)

QuickBooks Pro Advisor Certification (2005)

## **Other Activities**

Coaching youth sports; primarily baseball and soccer

Astronomy

## **David M. Kaufmann – Software Designed or Developed**

### **Software Designed and Developed**

How To Setup A Paperless Office (a white paper)

S Corp Vs. Partnership/LLC/Sole – Proprietorship Analyzer

C Corporation Vs. S Corporation Analyzer

Employee Auto Compensation Analyzer

Education Funding Analyzer

Roth Vs. Regular IRA Analyzer

IRS/State Interest & Penalty Calculator

Altria/Kraft/Philip Morris Basis Calculator

GM/EDS/DirecTV/News Corp Basis Calculator

Social Security Retirement Benefit Planner

C Corporation Tax Calculator

Form 2210 Calculator

Form 2220 Calculator

Corporate Net Operating Loss Calculator

Individual Net Operating Loss Calculator

Due Date Reminder System (DOS)

IRA Distribution Planner (DOS)

After – The – Fact Payroll System

Form 1099 System

W-2 Magnetic Media Checker

Refinance Cost or Benefit Analyzer

Individual Tax Calculator

Withholding Allowance Calculator

(IRC) Section 444 Calculator

### **Software Designed**

Alternative Minimum Tax (AMT) Planner

AT&T Divestiture Basis Tracker

Bardahl Formula and Accumulated Earnings Tax Planner

Mutual Fund & Stock Basis Keeper

Like-Kind Exchange Vs Sale Analyzer

Financial Tools

IRA/Pension Distribution Planner

Lease Vs. Buy Analyzer