

**Bruce F. Malott, CPA, CFF**  
**Managing Principal**  
**O<sub>2</sub> CPA Consulting Group**  
**901 3<sup>rd</sup> Street NW, Suite A**  
**Albuquerque, NM 87102**  
**(505) 715-5510**

**BORN:** February 1, 1957 - Brooklyn, New York

**EDUCATION:** Eldorado High School - May 1975  
Albuquerque, New Mexico

Arizona State University  
Bachelor of Science - August 1979  
Magna Cum Laude

**PROFESSIONAL  
DESIGNATIONS:**

Certified Public Accountant - February 1980  
New Mexico

Certified Financial Planner – July 1988 to December 2011

Certified Valuation Analyst - November 1999 to December 2013

Certified in Financial Forensics – December 2008

A.I.C.P.A. Certificate of Educational Achievement -  
Tax Planning and Advising for Closely Held Businesses - October 1993

A.I.C.P.A. Certificate of Educational Achievement -  
Business Valuation - October 1999

Financial Investigations Course - Department of the Treasury,  
Internal Revenue Service - November 2001

Certificate of Achievement in Public Plan Policy-International  
Foundation of Employee Plans – June 2009

**PROFESSIONAL  
EMPLOYMENT:**

Deloitte, Haskins & Sells - September 17, 1979 through September 1, 1983  
Senior Accountant  
Albuquerque, New Mexico

Meyners + Company, LLC - September 1, 1983 to December 31, 2010  
Managing Principal  
Albuquerque, New Mexico

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O<sub>2</sub> CPA Consulting Group, LLC – January 7, 2011 to Present  
Managing Principal  
Albuquerque, New Mexico

PROFESSIONAL  
ASSOCIATIONS:

American Institute of Certified Public Accountants

New Mexico Society of Certified Public Accountants

PROFESSIONAL  
APPOINTMENTS:

Executive Committee, Management Consulting Service Division of the  
American Institute of Certified Public Accountants; Member -  
October 1993 to October 1996

Computer Applications Sub-Committee of the American Institute of Certified  
Public Accountants; Chairman - October 1989 through October 1992  
Computer Applications Sub-Committee of the American Institute of Certified  
Public Accountants; Member - October 1986 through October 1989

Editorial Advisory Board, Partner-to-Partner Advisory, a Harcourt Brace  
Publication - October 1997, October 2000

Economic Damages Sub-Committee of the American Institute of Certified  
Public Accountants - February 1999, September 2001

Chairman - New Mexico State Board of Public Accountancy - June 2003 -  
December 2004

Secretary - New Mexico State Board of Accountancy - July 2005 – 2009

Vice-Chairman- New Mexico State Board of Accountancy –January 2010 to  
January 2011

Member - New Mexico State Board of Accountancy – January 2011 to  
December 2011

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PUBLICATIONS: “Your First Litigation Engagement,” **The CPA Journal**, Vol. 17, No. 2, Fall 1997.

“Domestic Relations Aspects of the Taxpayer Relief Act of 1997,” **Fair Share**, Vol. 18, No. 2, February 1998.

“Helping Law Firms Out of The Profit Squeeze,” **CPA Management Consultant**, March 1998.

“Technology- Friend or Foe?” **Partner-to-Partner Advisory**, March 1998.

“Use of Electronic Databases in Litigation Engagements” **CPA Litigation Service Counselor**, October 1998.

“Do Your Partners File Their Tax Returns?” **Partner-to-Partner Advisory**, March 1999.

“Damage Awards and Settlements- Working With the Tax Planning Aspects” **Financial Advisory Service Alert**, December 1999.

“Guide to Divorce Taxation” - Co-Editor - Biebl Rawweiler Portfolio Services - Practitioners Publishing Company, July 2000

“Congress Remedies Circuit Court Split on Deductibility of Attorney’s Fees”- **New Mexico Employment Law Letter**- February 2005

PROFESSIONAL  
SPEAKING:

**Date:** May 1987  
**Group:** Computers in Law Office Management  
**Topic:** Billing and Accounting for the Small Law Firm  
**Location:** Albuquerque, New Mexico

**Date:** July 1987  
**Group:** New Mexico Academy of General Dentistry  
**Topic:** Personal Financial Planning  
**Location:** Albuquerque, New Mexico

**Date:** November 1987  
**Group:** UNISYS  
**Topic:** Inventory Control  
**Location:** Albuquerque, New Mexico

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**Date:** August 1988  
**Group:** State Bar of New Mexico  
**Topic:** Running the Law Firm Like a Business  
**Location:** Albuquerque, New Mexico

**Date:** September 1988  
**Group:** State Bar of New Mexico  
**Topic:** Utilization of CPAs in Today's Legal Environment  
**Location:** Ruidoso, New Mexico

**Date:** October 1988  
**Group:** American Institute of Certified Public Accountants  
**Topic:** Automating Your Office  
**Location:** Los Angeles, California

**Date:** October 1988  
**Group:** Robert Morris & Associates  
**Topic:** Lenders Income Tax Seminar  
**Location:** Albuquerque, New Mexico

**Date:** December 1988  
**Group:** Merrill Lynch  
**Topic:** Medical Catastrophic Coverage Act of 1988  
**Location:** Albuquerque, New Mexico

**Date:** February 1989  
**Group:** Golden West Credit Conference  
**Topic:** Analyzing Financial Statements  
**Location:** Albuquerque, New Mexico

**Date:** October 1989  
**Group:** New Mexico Osteopathic Medical Association  
**Topic:** Approaching Medical Practice as a Business  
**Location:** Albuquerque, New Mexico

**Date:** March 1990  
**Group:** New Mexico Medical Group Management Association  
**Topic:** Computerization of a Medical Practice  
**Location:** Albuquerque, New Mexico

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**Date:** June 1990  
**Group:** New Mexico Chiropractic Association  
**Topic:** Practice Management and Personal Financial Planning  
**Location:** Albuquerque, New Mexico

**Date:** October 1990  
**Group:** Missouri Society of Certified Public Accountants  
**Topic:** Management of an Accounting Practice  
**Location:** Kansas City, Missouri

**Date:** January 1991  
**Group:** Albuquerque Chamber of Commerce  
**Topic:** Traditional and Alternative Sources of Securing Capital  
**Location:** Albuquerque, New Mexico

**Date:** February 1991  
**Group:** New Mexico Bankers Association  
**Topic:** Financial Statement Analysis  
**Location:** Albuquerque, New Mexico

**Date:** August 1991  
**Group:** American Institute of Certified Public Accountants  
**Topic:** Using Computers in your Practice  
**Location:** Orlando, Florida

**Date:** October 1992  
**Group:** Louisiana State Society of Certified Public Accountants  
**Topic:** Harnessing the Power of Micro Computers  
**Location:** New Orleans, Louisiana

**Date:** October 1992  
**Group:** American Institute of Certified Public Accountants  
**Topic:** Marketing Through the Media  
**Location:** Orlando, Florida

**Date:** January 1993  
**Group:** Non-Profit Financial Managers' Association  
**Topic:** Internal Policies, Procedures, and Control Systems  
**Location:** Albuquerque, New Mexico

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**Date:** January 1993  
**Group:** International Association of Business Communicators  
**Topic:** Employee Dishonesty  
**Location:** Albuquerque, New Mexico

**Date:** March 1993  
**Group:** Private Investigators Association of New Mexico, Inc.  
**Topic:** Working with the CPA in Employee Dishonesty Cases  
**Location:** Albuquerque, New Mexico

**Date:** March 1993  
**Group:** Albuquerque Chamber of Commerce  
**Topic:** Employee Dishonesty  
**Location:** Albuquerque, New Mexico

**Date:** April 1993  
**Group:** The Institute of Real Estate Management  
**Topic:** Employee Dishonesty  
**Location:** Albuquerque, New Mexico

**Date:** May 1993  
**Group:** Robert Morris Associates  
**Topic:** Determining Cash Flows from Tax Returns  
**Location:** El Paso, Texas

**Date:** August 1993  
**Group:** Lion's Club  
**Topic:** Employee Dishonesty  
**Location:** Albuquerque, New Mexico

**Date:** August 1993  
**Group:** Apartment Association of New Mexico  
**Topic:** Loss Prevention  
**Location:** Albuquerque, New Mexico

**Date:** November 1993  
**Group:** Albuquerque Chamber of Commerce  
**Topic:** Finding the Bucks - Curbstone Conference  
**Location:** Albuquerque, New Mexico

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**Date:** November 1993  
**Group:** Rotary Club of Albuquerque  
**Topic:** Employee Dishonesty  
**Location:** Albuquerque, New Mexico

**Date:** March 1994  
**Group:** Civitan Club  
**Topic:** Employee Dishonesty  
**Location:** Albuquerque, New Mexico

**Date:** May 1994  
**Group:** New Mexico Osteopathic Medical Association  
**Topic:** A Physician's Hidden Partner: Internal Employee Theft  
**Location:** Santa Fe, New Mexico

**Date:** May 1994  
**Group:** General Business Public  
**Topic:** Employee Theft  
**Location:** Albuquerque, New Mexico

**Date:** October 1994  
**Group:** New Mexico Osteopathic Medical Association  
**Topic:** 1994 Income Tax Planning: What to do Before It's Too Late  
**Location:** Albuquerque, New Mexico

**Date:** October 1994  
**Group:** Sunwest Bank  
**Topic:** Employee Theft  
**Location:** Albuquerque, New Mexico

**Date:** November 1994  
**Group:** State Bar Solo/Small Firm Practitioners Symposium  
**Topic:** Personal Marketing: How to Be Effective at Getting and Keeping Clients  
**Location:** Albuquerque, New Mexico

**Date:** November 1994  
**Group:** New Mexico Veterinary Society  
**Topic:** Employee Dishonesty  
**Location:** Albuquerque, New Mexico

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**Date:** November 1994  
**Group:** American Institute of Certified Public Accountants  
**Topic:** Developing an Entrepreneurial Culture Within Your Firm  
**Location:** New Orleans, Louisiana

**Date:** January 1995  
**Group:** Apartment Association of New Mexico  
**Topic:** Honesty in the Work Place  
**Location:** Albuquerque, New Mexico

**Date:** February 1995  
**Group:** Norwest Banks  
**Topic:** Assisting Customers for Increased Cash Flow  
**Location:** Albuquerque, New Mexico

**Date:** March 1995  
**Group:** Robert Morris Associates  
**Topic:** Determining Cash Flow from Tax Returns  
**Location:** Albuquerque and Roswell, New Mexico

**Date:** March 1995  
**Group:** International Sleep Products Association  
**Topic:** Employee Dishonesty  
**Location:** Albuquerque, New Mexico

**Date:** April 1995  
**Group:** New Mexico Home Builders Association  
**Topic:** Employee Dishonesty  
**Location:** Albuquerque, New Mexico

**Date:** April 1995  
**Group:** Serta Inc.  
**Topic:** Employee Dishonesty  
**Location:** Ontario, California

**Date:** May 1995  
**Group:** Non-Profit Financial Managers Association  
**Topic:** Up Your Cash Flow  
**Location:** Albuquerque, New Mexico



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**Date:** September 1995  
**Group:** New Mexico Court Reporters Association  
**Topic:** Flat Tax and Social Security  
**Location:** Albuquerque, New Mexico

**Date:** November 1995  
**Group:** Lew Engle Seminar  
**Topic:** Preserving the Family Business  
**Location:** Albuquerque, New Mexico

**Date:** April 1996  
**Group:** BOMA Southwest Regional Conference  
**Topic:** Crimes in Your Building  
**Location:** Albuquerque, New Mexico

**Date:** July 1996  
**Group:** National Business Institute  
**Topic:** Community Property Distribution in Divorce  
Settlements in New Mexico  
**Location:** Albuquerque, New Mexico

**Date:** July 1996  
**Group:** New Mexico Society of Women Accountants  
**Topic:** Auditors' Responsibility in Detecting Fraud  
**Location:** Albuquerque, New Mexico

**Date:** October 1996  
**Group:** New Mexico Osteopathic Society  
**Topic:** Employee Dishonesty  
**Location:** Albuquerque, New Mexico

**Date:** November 1996  
**Group:** Heights Optimist Club  
**Topic:** Dishonesty in the Workplace  
**Location:** Albuquerque, New Mexico

**Date:** November 1996  
**Group:** University of New Mexico Chapter of  
Beta Alpha Psi  
**Topic:** Employee Dishonesty  
**Location:** Albuquerque, New Mexico

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**Date:** May 1997  
**Group:** National Business Institute  
**Topic:** New Mexico Non-Profits  
**Location:** Albuquerque, New Mexico

**Date:** July 1997  
**Group:** New Mexico Criminal Defense Lawyers  
**Topic:** The Use of Forensic Accountants  
**Location:** Albuquerque, New Mexico

**Date:** September 1997  
**Group:** New Mexico State Bar  
**Topic:** Trust Fund & Employee Fraud  
**Location:** Farmington, New Mexico

**Date:** September 1997  
**Group:** New Mexico State Bar  
**Topic:** Creating a Fat Free Law Firm  
**Location:** Farmington, New Mexico

**Date:** October 1997  
**Group:** New Mexico Human Services Department  
**Topic:** Employee Dishonesty  
**Location:** Red River, New Mexico

**Date:** November 1997  
**Group:** American Bar Association  
**Topic:** Taxpayer Relief Act of 1997  
**Location:** Phoenix, Arizona

**Date:** February 1998  
**Group:** Beta Alpha Psi  
**Topic:** Employee Fraud  
**Location:** Albuquerque, New Mexico

**Date:** May 1998  
**Group:** American Institute of Certified Public Accountants  
**Topic:** Tax and Accounting Issues for Today's Law Firm  
**Location:** Las Vegas, Nevada

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**Date:** June 1998  
**Group:** American Institute of Certified Public Accountants  
**Topic:** Retirement Planning for CPA Firms  
**Location:** Las Vegas, Nevada

**Date:** June 1998  
**Group:** American Society of Women Accountants Regional Meeting  
**Topic:** Employee Dishonesty and Fraud Detection  
**Location:** Albuquerque, New Mexico

**Date:** September 1998  
**Group:** New Mexico Bar Association  
**Topic:** Financial Statements- Depiction or Deception?  
**Location:** Carlsbad, New Mexico

**Date:** October 1998  
**Group:** International Association of Financial Planners  
**Topic:** Valuation- Myths and Methodologies  
**Location:** Albuquerque, New Mexico

**Date:** December 1998  
**Group:** Illinois CPA Society  
**Topic:** Accounting and Taxes for Law Firms  
**Location:** Chicago, Illinois

**Date:** January 1999  
**Group:** New Mexico Bar Association  
**Topic:** Financial Forensics  
**Location:** Albuquerque, New Mexico

**Date:** May 1999  
**Group:** American Institute of Certified Public Accountants  
**Topic:** Accounting and Taxes for Law Firms  
**Location:** Chicago, Illinois

**Date:** June 1999  
**Group:** 2<sup>nd</sup> Annual Forum on Accounting Firm Mergers and Acquisitions  
**Topic:** Why Some Firms Sell and Some Don't  
**Location:** San Francisco, California

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**Date:** October 1999  
**Group:** American Institute of Certified Public Accountants  
**Topic:** "Thinking Like A Coach -- Getting Staff to Think Like Business People"  
**Location:** Las Vegas, Nevada

**Date:** December 1999  
**Group:** 3rd Annual Forum on Accounting Firm Mergers and Acquisitions  
**Topic:** CPA Firm Strategies  
**Location:** New York, New York

**Date:** June 2000  
**Group:** American Institute of Certified Public Accountants  
**Topic:** Accounting and Taxes for Law Firms  
**Location:** Washington, D.C.

**Date:** November 2000  
**Group:** BDO Seidman, LP  
**Topic:** Partner Compensation  
**Location:** Toronto, Canada

**Date:** November 2000  
**Group:** PDI, Inc.  
**Topic:** How to Build a Successful Consulting Practice  
**Location:** Chicago, Illinois

**Date:** May 2001  
**Group:** Accountants Global Network  
**Topic:** Getting Your Staff to Think Like Business People  
**Location:** Las Vegas, Nevada

**Date:** June 2001  
**Group:** American Institute of Certified Public Accountants  
**Topic:** Developing a Litigation Practice  
**Location:** Orlando, Florida

**Date:** June 2001  
**Group:** American Institute of Certified Public Accountants  
**Topic:** Accounting and Taxes for Law Firms  
**Location:** Orlando, Florida

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**Date:** May 2002  
**Group:** 58<sup>th</sup> Annual Southern Conference on Teacher Retirement  
**Topic:** Fraud in the Office  
**Location:** Santa Fe, New Mexico

**Date:** September 2002  
**Group:** CCIM Real Estate Group  
**Topic:** Income Taxes and the Commercial Realtor  
**Location:** Albuquerque, New Mexico

**Date:** September 2002  
**Group:** M. Lee Smith Publishers  
New Mexico Employment Law Letter  
**Topic:** Employee Theft: How to Spot it; How to Stop it;  
How to make sure it doesn't happen to you  
**Location:** Albuquerque, New Mexico

**Date:** October 2002  
**Group:** Bank of Albuquerque  
**Topic:** Employee Fraud  
**Location:** Albuquerque, New Mexico

**Date:** February 2003  
**Group:** Practice Development Institute, Inc.  
2003 National Sales Forum  
**Topic:** Ask Them Where They Want To Go, Then Lead Them There:  
The Why and How of Strategic Marketing  
**Location:** Chicago, Illinois

**Date:** August 2003  
**Group:** National Association of State Retirement Administrators  
**Topic:** System Governance- Fraud and Employee Dishonesty  
**Location:** Monterey, California

**Date:** August 2003  
**Group:** 32nd Annual Southwest Heart Symposium  
**Topic:** Medical Economics  
**Location:** Albuquerque, New Mexico

**Date:** September 2003  
**Group:** 2003 TAX Practitioners Institute  
**Topic:** Understanding IRS Circular 230  
**Location:** Las Cruces and Albuquerque, New Mexico

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**Date:** October 2003  
**Group:** Association of Latino Professionals in Accounting & Finance  
**Topic:** The CPA as an Expert Witness  
**Location:** Albuquerque, New Mexico

**Date:** May 2004  
**Group:** Association of Commercial Realtors  
**Topic:** Tax Considerations for Tenant Improvement  
**Location:** Albuquerque, New Mexico

**Date:** September 2004  
**Group:** New Mexico CPA Society  
**Topic:** Forensic Accounting for the Tax Professional  
**Location:** Farmington & Albuquerque, New Mexico

**Date:** December 2006  
**Group:** American Institute of Certified Public Accountants  
**Topic:** The Role of the Managing Partner  
**Location:** Orlando, Florida

**Date:** March 2007  
**Group:** International Foundation of Employee Benefit Plans  
**Topic:** Ethical Dilemmas and Managing Internal Risks  
**Location:** San Diego, California

**Date:** March 2007  
**Group:** New Mexico Trial Lawyers Association  
**Topic:** Taxation Aspects of Settlements and Confidentiality Clauses  
**Location:** Albuquerque, New Mexico

**Date:** March 2008  
**Group:** New Mexico State Bar Association  
**Topic:** Where Accounting Budgets Meet Business Realities  
**Location:** Albuquerque, New Mexico

**Date:** August 2008  
**Group:** The Advisory Board - Forum on Recruiting and Retention  
**Topic:** The Managing Partner's Impact on Human Capital  
**Location:** Las Vegas, Nevada

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**Date:** October 2008  
**Group:** Associated General Contractors of America  
**Topic:** How to Forecast Financial Stability  
**Location:** Albuquerque, New Mexico

**Date:** October 2008  
**Group:** CCH User Conference 2008  
**Topic:** Mining Your Talent - A Story of Team Success  
**Location:** Palm Desert, California

**Date:** January 2009  
**Group:** New Mexico Association of General Contractors  
**Topic:** Winning in a Down Economy-How Did We Get Here and What Do We Do?  
**Location:** Albuquerque, New Mexico

**Date:** July 2009  
**Group:** New Mexico Family Business Alliance  
**Topic:** Winning in a Down Economy-How Did We Get Here and What Do We Do?  
**Location:** Albuquerque, New Mexico

**Date:** October 2009  
**Group:** CCH Conference  
**Topic:** The Economics of Managing Today's CPA Firm  
**Location:** Washington, DC

**Date:** October 2009  
**Group:** CCH Conference  
**Topic:** A Silver Lining in Every Cloud  
**Location:** Washington, DC

**Date:** June 2010  
**Group:** Michigan Association of CPAs  
**Topic:** The Managing Partner's Role and Impact on Human Capital; Succession Planning – Identifying and Developing New Leaders  
**Location:** Novi, Michigan

**Date:** November 2010  
**Group:** CCH User's Conference  
**Topic:** The Role of the Managing Partner in Human Capital  
**Location:** Orlando, Florida

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**Date:** January 2011  
**Group:** The Advisory Board-Winning is Everything  
**Topic:** Selling Your CPA Firm  
**Location:** Las Vegas, Nevada

**Date:** November 2012  
**Group:** New Mexico Association of Legal Administrators  
**Topic:** Fraud and Dishonesty in the Workplace  
**Location:** Albuquerque, New Mexico

TELEVISION  
APPEARANCES:

**Date:** 1991, 1992, 1993, 1994 and 1995  
**Group:** KOAT-TV - ABC Affiliate  
**Topic:** Tax Tips - weekly news spot on income taxes  
**Location:** Albuquerque, New Mexico

**Date:** 1988, 1989, and 1990  
**Group:** KGGM-TV - CBS Affiliate  
**Topic:** Tax Tips - weekly news spot on income taxes  
**Location:** Albuquerque, New Mexico

**Date:** 1997  
**Group:** KOB-TV - NBC Affiliate  
**Topic:** Tax Tips - weekly news spot on income taxes  
**Location:** Albuquerque, New Mexico

**Date:** 2008, 2009, and 2010  
**Group:** KOAT-TV - ABC Affiliate, KRQE-TV – CBS Affiliate  
**Topic:** The Financial Crisis - America's Economy  
**Location:** Albuquerque, New Mexico



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COMMUNITY  
ACTIVITIES:

**Board Member:**

BBVA Compass Bank - Advisory Board  
\$600 million in assets, 2001 to current

Downtown Action Team – Board of Directors and  
Treasurer, 2014 to current

Former Member & Secretary, New Mexico Retiree  
Healthcare Authority, 2008 – 2009

Former Chairman, Educational Retirement Board  
New Mexico  
Chairman, Investment Committee  
Chairman, Audit Committee  
\$8.6 billion in assets, 1999-2010

Leadership New Mexico  
Graduate, 2005

I have been offered to and accepted by state and federal courts as an expert witness on accounting and financial matters in both civil and criminal cases on many occasions. In civil cases, I have extensive experience testifying as an expert witness for plaintiffs and defendants in trials and depositions as to damages suffered and the valuation of business losses as well as other types of economic damages. On numerous occasions, I have worked on a consulting basis with various attorneys or insurance companies concerning financial and accounting aspects of their cases, including on several occasions regarding complex analysis of losses due to business interruption. In addition, I have served as a Special Master, appointed directly by the judge to make analysis and decisions concerning financial aspects of disputes and have been appointed as expert by the court in domestic relations matters to directly aid the court in its decision-making process. I have participated as a mediator or facilitator in many civil and domestic relations cases.