

### **Areas of Focus:**

- Small business services including: Business planning, financial planning and consulting for businesses and individuals.
- Income tax planning and preparation for individuals, businesses and trusts.
- Financial statement compilation and review.
- Strategic planning and taxation of real estate partnerships.
- Accounting services.

### **Experience:**

Richard has more than 35 years of diversified public accounting experience. He is well versed in many industry sectors, including service companies, manufacturing and real estate. Previously, Richard served as Managing Partner at Lockwood & Jaeger, CPAs/Lockwood Accountancy Corporation for 22 years, preceded by 10 years with Williamson & Associates.

### **Professional Activities:**

Richard is a member of the American Institute of Certified Public Accountants and California Society of CPAs.

### **Education and Licenses:**

- California State University Fullerton  
BA in Business Administration (Accounting)
- CPA – California
- NASD Series 7 Securities License - California