

**“WHEN YOU NEED MORE THAN AN ACCOUNTANT...  
GET AN EXPERT”**



## **William F. Wolf**

*CPA, MBA, CFE, Senior Partner*

### **THE EXPERT:**

Bill Wolf heads the Tax and Accounting Department at White Zuckerman Warsavsky Luna Wolf & Hunt, LLP. Bill handles complex tax and accounting matters for wealthy business owners and minimizes their business and individual taxes. He also resolves accounting disputes among owners, investigates fraud, and testifies as an expert witness. Bill brings you the best results by utilizing over 35 years of experience as a CPA, including 20 years with a “Big 4” accounting firm. He has saved his clients millions of dollars (see back side for recent success stories).

### **THE FIRM:**

White Zuckerman Warsavsky Luna Wolf & Hunt, LLP is one of the foremost forensic accounting firms in Southern California, with over 80 professionals in its Sherman Oaks, Newport Beach, and Santa Barbara offices. While the firm performs traditional audit and tax services, the firm specializes in expert testimony, with particular emphasis in family law and commercial litigation. The 15 partners of the firm have testified in thousands of cases covering a broad range of damage, valuation and general accounting matters.

### **BILL WOLF’S PRACTICE AREAS:**

- Expert testimony
  - \* Damages
  - \* Profitability
  - \* Tax matters
  - \* Standard of care for CPAs
- Fraud investigations
  - \* Embezzlement
  - \* Profit allocation
  - \* Manipulation of financial statements
- Advanced tax planning
- IRS examinations
- Neutral referee in accounting disputes
- Audits of financial statements
- Verification of compliance with contracts

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**White  
Zuckerman  
Warsavsky  
Luna  
Wolf  
Hunt LLP**

## **BILL WOLF'S RECENT SUCCESS STORIES**

### **EXPERT TESTIMONY:**

- ❑ Testified as **damages expert** on behalf of U.S. Department of Justice in five “billion dollar” breach of contract cases brought by Fortune 500 companies against the U.S. government. Revealed areas where the damage claims were overstated by more than **\$100 million**.
- ❑ Engaged by court to **investigate fraud** in manufacturing business owned by two families. Found **\$1 million** in disguised payments to one family.

### **TAX:**

- ❑ Performed **estate planning** for wealthy client that involved setting up trusts and family limited partnership. Defended the client in an IRS challenge to the planning. Negotiated settlement with the IRS wherein the client achieved **\$30 million** in tax savings.
- ❑ Performed complimentary initial review of a **complex income tax return** and identified **\$2 million** in additional tax savings. Was immediately engaged.

### **ACCOUNTING:**

- ❑ Evaluated the **profit sharing** between partners in a large real estate development joint venture. Found an additional **\$4 million** of profit that should have been allocated to client causing other partner to pay \$4 million without litigation.
- ❑ Jointly engaged by two shareholders to **equalize shareholder compensation**. Determined perquisites and other payments taken by both owners and calculated an equalization payment that satisfied both shareholders.

## **BILL WOLF'S PERSONAL INFORMATION:**

- ❑ University of Southern California MBA 1970
- ❑ Professional Associations: American Institute of Certified Public Accountants, California Society of Certified Public Accountants, and Association of Certified Fraud Examiners
- ❑ Publications: *Understanding Business Tax Returns* – ABA practice guide
- ❑ Married over 35 years to Therese, two fantastic children, five grandchildren
- ❑ Hobbies: Travel, boating, scuba diving, skiing-water and snow