

Alan D. Westheimer, CPA/CFF, CFE

4544 Post Oak Place Drive, Suite 320, Houston, TX 77027-3104

Office 713.623.8911 Fax 713.623.8914

alan@westheimercpa.com www.westheimercpa.com



PROFILE

A practicing CPA for over 50 years as a member of the staff of both an international accounting firm and a regional firm; as a founding partner or owner of three accounting firms in Houston, Texas; and as the partner-in-charge of the Houston office of an international accounting firm. Additionally, he has conducted a parallel practice as a CFE for the past 23 years. His current CPA/CFE consulting practice focuses on litigation support services, federal tax services, and practice management consulting for professional firms.

As a consulting and testifying expert for more than 30 years on cases large and small, in state and federal courts, Mr. Westheimer has served as an expert for both plaintiff and defense attorneys on a wide variety of complex cases, typically focused on economic damages/lost profits. Cases have included:

- Economic Damages / Lost Profits
- Federal and State Taxation
- Generally Accepted Accounting Principles - GAAP
- Estate / Probate / Family Law
- Alter Ego
- Fraud / Forensic Investigations
- Bankruptcy
- Professional Misconduct

Mr. Westheimer has been a member of the Adjunct Faculty of the Jones Graduate School of Business of Rice University and of the Bauer College of Business of the University of Houston, where he taught courses to graduate students. In 1998 he received an award for teaching excellence from the alumni of the University of Houston program. Mr. Westheimer has also been a member of the Adjunct Faculty of the University of Houston Law Center, where he taught courses to JD and LLM degree candidates.

Mr. Westheimer has authored many articles for publication in the fields of litigation support, federal taxation, and professional firm practice management, including as a co-author of *AICPA Consulting Services Special Report 03-1, Litigation Services and Applicable Professional Standards*. He has served as a committee member and on the Board of Directors of several professional organizations and as editorial advisor, and in one case as editor, of several professional publications. He spent six years as a public member of a State Bar of Texas Grievance Committee assisting in the adjudication of grievances filed against Texas attorneys. In the mid-1990s he was twice recognized by an accounting industry professional publication as one of the 100 most influential people in accounting in the United States. From 2008–2011 Mr. Westheimer served on the AICPA Forensic and Litigation Services Committee, which oversees this area of practice for the AICPA.

EDUCATION AND CREDENTIALS

MBA University of California, Haas School of Business, Berkeley, CA

BSE University of Pennsylvania, Wharton School of Finance and Commerce, Philadelphia, PA

Certified Public Accountant (CPA) Texas

Certified Fraud Examiner (CFE)

Certified in Financial Forensics (CFF)

Chartered Global Management Accountant (CGMA)

PROFESSIONAL MEMBERSHIPS

American Institute of Certified Public Accountants

Texas Society of CPAs

Houston CPA Society

Association of Certified Fraud Examiners

and Houston Area ACFE Chapter

American Bar Association (Associate Member)

Houston Estate and Financial Forum

Houston Business & Estate Planning Council

Wednesday Tax Forum

Tax Procedure Group