

CURRICULUM VITAE

Cummings, Lamont & McNamee, P.A.
305 Lafayette Center
P.O. Box 328
Kennebunk, Maine 04043
(207) 985-3339

ALICE W. FERRAN, MBA, CPA, PFS, CFP® **Principal**

EDUCATION

MBA, University of Maine.
BS, Nasson College.
BA, MA, University of Florida.
CPA Certification in 1982, passing all parts of CPA Exam in first sitting. Earned AICPA designation as Personal Financial Specialist in 2002. Earned CFP® Practitioner status in 2004. Passed Series 65 and Series 7 exams for Registered Investment Advisors.
Minimum of forty hours of tax and accounting courses annually.

PROFESSIONAL HISTORY

Cummings, Lamont & McNamee, CPAs 1981 - present.
Responsibilities include heading the firm's Estate and Trust tax and consulting services. Provide investment advisory and personal financial planning services to individuals.

RANGE OF EXPERIENCE

Experience includes testimony as expert witness, assistance to counsel in preparing and completing depositions and cross examination of opposing witnesses, valuation of closely-held business interest, and assistance in litigation strategy; additionally, over twenty seven years practice in tax planning, auditing and general business planning.

SUMMARY OF SIGNIFICANT VALUATION AND LITIGATION EXPERIENCE

Valuation Services

Retained to perform valuations of closely-held corporations for purchase or sale of business, marital litigation and estate planning.

Litigation Services

Provided litigation services in damage assessment for lost profits, stockholder suits, and for other civil matters. Services included damage analysis and tax planning in regard to settlement agreements.

TEACHING EXPERIENCE

Accounting and Mathematics Instructor, Center for Academic Skills, Nasson College, Springvale, Maine.

Mathematics Instructor, Benedict College, Columbia, South Carolina.

Various seminars on subjects including taxation, not-for-profit accounting and computer information systems.

PROFESSIONAL AFFILIATIONS Member of the American Institute of Certified Public Accountants.

Former Member of the Management Consulting Services Committee of Polaris International.

Member of the Management Consulting Services Division of the American Institute of Certified Public Accountants.

Registered Investment Advisor.

Maine Society of CPAs.

Past President of Kennebunk/Kennebunkport Chamber of Commerce

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