Charles J. McLucas, Jr.

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Summary

Extensive experience in tax and financial planning for high net worth clients. Founded, developed and sold two CPA firms and one Trust Administration firm over the past forty five years and have grown a fourth. Provided professional investment management services via two RIA firms for over 33 years. Established and developed the Redding, CA branch of one of the firms managed over $50 million in assets. Proficient in tax review and preparation of 5227, 1041, 1040, 1120, 1120s, 1065, 706 and 709. My client base has ranged from 150 to 850.

PROFESSIONAL EXPERIENCE

Charitable Trust Administrators, Inc., Tustin, CA **1995 – Present**
Accounting and Trust Administration Company.

President and Founder

Responsible for founding and developing a charitable trust administration company focused on the accounting and tax preparation of various planned giving instruments.

- Developed a four-tier accounting system collaborated with Creative Solutions software to account for the various tiers of income inside charitable trusts. Created custom reports which provided both the donors and the respective non-profits with information to measure and maintain accurate assessments of the cost and market values of these trust on a periodic basis.
- Solidified the organizational infrastructure and developed strategic and tactical growth and operating plans that have led to the ability to service both individual trustees and non-profit organizations.
- Negotiated key contracts with significant charities.
- Set up systems and procedures to train bookkeepers and staff on trust accounting requirements for both federal and state agencies.
- Prepared annual reports for the California Department of Insurance Gift Annuity programs for various charities. Calculated the annual reserve requirements for these pooled funds.
- Provided full “back-office” support for several institutions and public charities for all of their planned giving operations.
- Provided proposals and the establishment of over 400 charitable giving instruments for both individuals and institutions.
- Preparation of Individual, C & S Corp. returns, Partnerships, Trust, Estate and Gift, non-profit tax returns. Review of all types of tax returns for several local CPA firms in Orange County.

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Yosemite Capital Management, LLC Tustin, CA **2003-2014**
Registered Investment Advisory firm which focuses on Charitable, Pension and Profit-sharing for high net worth clients.

Responsibility for developing the non-profit sector of operations for the company. Helped develop portfolios for charitable trust and gift annuity programs.

- Advanced profits by 10% annually for the non-profit sector.
- Managed and integrated CRT funds, personal portfolios and retirement accounts for clients who were at or nearing retirement.
- Developed leadership into strategic planning to focus on the high net worth market.

Halbert, Hargrove/Russell. Long Beach, CA **1975-2003**
Affiliated with the Frank Russell Company, Tacoma WA as a registered investment advisory firm with offices in Long Beach, San Diego, Redding, Denver and Spokane. (Over $1.0 Billion in assets under management)

Investment Advisor, Northern California Division
Responsible for managing the Redding, California branch with assets under managment of approximately $50 million representing both individual and trust accounts for Northern California.

- Established the Redding, California Branch as well as maintaining the charitable sector accounts for the various other offices of the firm.
- Oversaw the non-profit sector of the firms operation.
- Developed strategic plans focused on the non-profit communities for all branch operations.

C. J. McLucas Jr., CPA Inc. Redding, CA **1981-Present**
Regional CPA firm in the Northern California area.
Founder and President
Managed a CPA practice with 600 clients.

- Supervised a team of 15 associates in the Northern California area.
- Increased sales and profits by 20% per year.
- Sold the practice in 2001 to move back down to Southern California

Previous positions held include:

Founding member and Treasurer, **Destiny Fellowship, Redding, CA** **1993 – 2000**
Local Church non-demonational.

Chief Financial Officier, **Light Ministries, Viola, CA** **1980 – 1983**
Revival Ministry and Lassen Pines Christian Conference Grounds manager.

Managing Partner, **Tracey and McLucas CPA's, Santa Ana, CA** **1970-1980**
Certified Public Accounting Firm.

Revenue Agent, Internal **Revenue Service, Laguna Niguel, CA** **1967-1971**
Department of the Treasury, US Government

EDUCATION

CALIFORNIA STATE UNIVERSITY, Fullerton, CA Athlete/Men's Basketball
Bachelor of Arts, Business Administration *(focus in Accounting),* 1967
Pepperdine Law School, Santa Ana, CA 1970
No degree earned
Biola University, LaMirada, CA 1971
No degree earned-One year of Bible training

PROFESSIONAL DESIGNATIONS

Certified Public Accountant
Personal Financial Specialist (as designated by the AICPA)
Accredited Estate Planner (as designated by the National Association of Estate Planners & Councils)

AFILIATIONS

Professional Advisory Council Member
Children's Hospital of Orange County, *2009 – Current*
Vanguard University, Costa Mesa, *2010 – Current*
Concordia University, Irvine 2012*-Current*
Kingdom Advisors, Atlanta *Charter member 2003-Current*
American Cancer Society National Office *2013-Current*
Fellowship of Companies for Christ International, *2002- Current*