



PHILLIP BRUCE CHUTE, EA

Phillip B Chute, EA Financial Services, Inc

PRESIDENT/OWNER

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GENERAL

Businessman-writer and currently a tax, financial advisor with a consulting office in Temecula, California. An authority in aspects of finance and a seasoned tax preparer for business and individual returns. Enrolled Agent of the U.S. Treasury since 1976 practicing financial planning and management.

EXPERIENCE

- TAX BUSINESS & FINANCIAL CONSULTING (1974 – PRESENT)

Prepares and supervises individual, business, fiduciary, estate, corporate, partnership tax returns. Represents clients in audits to include payroll, sales tax, secured and unsecured property taxes, workman's compensation, Labor Board, IRS and FTB individual taxes, corporate, gift, and estate taxes.

- KEOGLER MORGAN SECURITIES, Foothill Securities, FSC Securities, Pacific West Group Financial, Transamerica (1988-2001)

Financial salesperson, securities principal. Supervised brokers under the Office of the Supervisory Jurisdiction, branch office in Orange County.

EDUCATION

- BS BUSINESS ADMINISTRATION, CAL STATE UNIV OF, LOS ANGELES (1975)
 - AA BUSINESS, PASADENA CITY COLLEGE (1967)
 - BUSINESS ACCREDITED PROGRAM, NORTHEASTERN UNIVERSITY, BOSTON, MA (1965)
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HONORS AND AWARDS

- Awarded by the State of California a Private Investigator license as a business credit reporter for Dun & Bradstreet.
- President & Registered Principal Advisor, Pacific Financial Advisors Corporation
- President, Riverside Tax Practitioner Association.
- Passed the IRS Special Enrolment Examination to become an Enrolled Agent
- NASD Licensed Registered Series 7, Registered Principal OSJ Series 24, Financial Advisor Series 63.
- California Casualty, Life & Disability, Variable Annuity Licenses
- Won 4 Kiwanis National Writing Awards

FORENSIC AUDIT EXPERIENCES

- 2019-2022 Messiah Minasian vs U.S. Internal Revenue Service:
Appeared and represented under POA IRS Audit to U.S. Tax Court, Small Cases. Client won a “No change verdict” after 27 months of litigation.
- 2018 Troy Dubail vs Lexi Dubail: Divorce Forensic Audit of Business
Represented Troy Dubail when his corporate financials were audited.
- 1998 Estate Spendthrift Case: Lawyer handling the Estate filed a claim with the Insurance Carrier which refused to settle without a forensic audit. Our office conducted an audit of the Estate after which the Insurance Company settled with the Estate lawyer.
- 1997 Represented client in a Probate forensic audit case to determine assets and liabilities of a small estate with no heirs. The final distribution went to a caregiver-friend and two charities.
- 1992 Gave testimony at a civil trial record keeping of corporate books, records, and corporate behaviour of a President/Owner of a radio station who was sued over funds used to purchase the murder weapon. The liability insurance company of the defendant settled before a judgment.
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PUBLICATIONS

- *Stocks, Bonds, & Taxes* A Comprehensive Handbook and Investment Guide for Everybody, 2020.
- *The Silver Thread of Life*, True Accounts and Dozens of Amazing Life-Changing Spiritual Interventions, 2018.
- *The Metric Clock*, a fiction book about the adventures of a young precocious boy transformed into a young man, 2018.
- *Rock & Roll Murders*, a fictional dramatization based on a true story, 2018.
- *American Independent Business*, a 500-page handbook and textbook on small business which is still in libraries worldwide, 1985.