

## **JERRY LIN ICVS, MS**



Mr. Lin began his career of professional consulting in 1996. Over the years, he has acquired a wide range of unique and variety of skills in multi-national business planning, across the border pricing & taxation strategies, business matters and management for local clients as well as international clients, focused on Taiwan and Greater China. As an independent consultant with a solid background as transfer pricing economist and valuation analysts, Mr. Lin has established a strong network with service professionals such as attorneys and CPAs in Southern California. He's becoming the go-to person for the affiliated professionals on case engagements as well as a training provider.

Starting in Fall 2001, Mr. Lin became an Adjunct Professor to teach Manufacturing & Material Process in the Department of Industry Technology at Cal State University Los Angeles. During the eight-year stretch, Mr. Lin facilitated co-op programs between the university and surrounding businesses, providing students with real world applications while helping entrepreneurs with academic resources.

He later founded a firm, J & D Facilitation Consultants, Inc., provides general consulting services as well as specialty services in connection with business planning, business valuations, real estate, litigation support, and other non-traditional disciplines. Traditional services include transfer pricing documentation for multi-national business entities, review and preparation of recordkeeping.

The firm is now serving many clients through networking with dozens of established accounting and legal firms, the majority of those clients are currently traded publicly in China, Taiwan or Hong Kong, with services including preparation of various studies, documentation and planning for individuals and businesses, business valuations and other services. Mr. Lin heads the Firm's effort in the areas of transfer pricing study and planning and business valuation services.

### **TRANSFER PRICING**

Mr. Lin has been engaged many times to review financial and operational documents in connection with transfer pricing compliance-related matters. Many of these engagements have included providing written annual reports of documenting inter-company transactions between US entities and their related foreign entities, as well as assisting clients in connection with IRS audits.

During this period, Mr. Lin became a preferred professional of Sino America Certified Public Accountants Association (SACPAA) and later to be invited as a non-CPA professional member.

Mr. Lin has also become a speaker in SACPA's workshop to provide CPE training in Transfer Pricing.

## **VALUATION SERVICES**

Mr. Lin has prepared numerous business valuations for purposes of acquisition or sale of a business, for stock valuation in accord with specific terms of buy/sell agreements, and estate/gift tax purposes. Mr. Lin completed a formal regimen of training in business valuations, attaining the designation as an International Certified Valuation Specialist (ICVS) by International Association of Consultants, Valuators (IACVA) to promote uniform standards of valuation when valuing closely held businesses. Mr. Lin has also become a qualified Business Valuation Instructor of IACVA in 2016.

## **EDUCATIONAL INSTRUCTOR**

**Business Valuation Instructor:** International Association of Consultants, Valuators (IACVA) certified.

**Adjunct Professor:** California State University of Angeles (CSULA), College of Engineering, Computer Science and Technology, Department of Industry Technology, 2001 ~ 2008.

**CPE speaker:** Sino America Certified Public Accountant Association (SACPAA).

**DEGREE:** Bachelor of Arts in Industrial Engineering – Tunghai University (1980)

Master of Science in System and Industrial Engineering – University of Arizona (1987)

## **CERTIFICATE and LICENSE**

Business Valuation Instructor

International Certified Valuation Specialist (ICVS)

## **INDIVIDUAL MEMBERSHIPS and ACTIVITIES**

- International Association of Consultants, Valuators & Analysts
- Sino America Certified Public Accountants Association – CPE Instructor
- Sino America Certified Public Accountants Association – Non-CPA Director

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