



## Jason Phelps, CPA

Certified Public Accountant with 15 years of audit and advisory experience across public accounting and industry. Brings strong technical knowledge of GAAP, PCAOB, and SOX requirements, with a track record of managing complex engagements for public, private, and pre-IPO companies. Known for analytical rigor, clear communication, and the ability to deliver high-quality results in fast-paced environments.

### Credentials & Expertise



#### Expertise

- ◆ Audit & Assurance
- ◆ Internal Controls / SOX 404
- ◆ System of Quality Management (SQM 1) Internal Audit
- ◆ Technical Accounting & Research
- ◆ Revenue Recognition (ASC 606)
- ◆ Business Combinations & Long- Lived Asset Impairment
- ◆ Lease Accounting
- ◆ REIT Accounting & Tax Considerations
- ◆ Equity & Share-Based Compensation Valuation
- ◆ Variance & KPI Analysis



#### Highlights

- ◆ **Ernst & Young, LLP**, System of Quality Management – Internal Audit – Contractor; Assurance Manager; External Audit Contractor
- ◆ **Jones, Henle & Schunck**, Senior Accountant



#### Technical Proficiency

- ◆ ProSystems FX Tax & Engagement
- ◆ RIA Checkpoint
- ◆ Fixed Asset CS
- ◆ BNA



#### Associations & Certifications

- ◆ Certified Public Accountant (CPA)
- ◆ Former member: AGC, Engineering Contractors' Association, Southern CA Contractors Association, Surety Claims Association of Los Angeles, Surety Underwriters Association of Southern CA



#### Industries

- ◆ Real Estate (Funds & REITs)
- ◆ Life Sciences & Biotech
- ◆ Software & Technology
- ◆ Consumer Products
- ◆ Construction Contractors



#### Achievements

- ◆ Conducted internal audits of EY's System of Quality Management (SQM 1), evaluating governance, risk assessment, and control effectiveness, and performed root-cause analyses to drive continuous quality improvement.
- ◆ Managed audits for public and private clients ranging from pre-revenue start-ups to multi-billion-dollar organizations, including confidential S-1 engagements.
- ◆ Oversaw complex accounting areas including ASC 606 revenue recognition, business combinations, REIT asset impairment, lease accounting, stock compensation, and valuations.
- ◆ Coordinated multidisciplinary teams across tax, IT, and valuation to deliver high-quality audit results under accelerated timelines.



#### Education

- ◆ **Bachelor of Science in Accounting**, Chapman University

For over 15 years, BGA has proudly filled the gap that often exists between accounting firms striving to maintain independence and their clients. We understand the compliance requirements and needs of our public and private clients. Our unwavering commitment to excellence has enabled us to assist thousands of domestic and international companies with everything from complex M&A transactions to IPOs and technical accounting for financial reporting.

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### Experience



Ernst & Young, LLP ♦ System of Quality Management, Internal Audit - Contractor – 2022 to 2023

- ♦ Assessed design and operating effectiveness of firm-wide quality management processes under SQM 1.
- ♦ Evaluated governance, leadership accountability, risk assessment processes, and audit quality controls.
- ♦ Tested controls across firm programs, including investment pricing, assurance learning, and tax learning.
- ♦ Performed root-cause analysis and evaluated remediation plans to strengthen audit quality and compliance.



Ernst & Young, LLP ♦ Assurance Manager – 2015 to 2020  
External Audit Contractor – 2021 to 2022

- ♦ Led financial statement and internal control audits for public and private companies, including pre-IPO and S-1 filers.
- ♦ Reviewed GAAP, SEC reporting, PCAOB standards, and SOX 404 compliance across major financial areas.
- ♦ Analyzed key metrics and variances to support audit conclusions.
- ♦ Tested complex areas including ASC 606, business combinations, impairments, equity compensation, lease accounting, and REIT-related matters.
- ♦ Coordinated component auditor reporting for global consolidations in Japan and France.
- ♦ Managed teams and collaborated with cross-functional specialists to deliver high-quality results.
- ♦ Recognized with EY Counselor Excellence awards in two consecutive years.



JHS Tax & Consulting (formerly Jones, Henle & Schunck) ♦ Senior Accountant – 2006 to 2015

- ♦ Managed and performed audits, reviews, and compilations for construction, real estate, nonprofit, and employee benefit plan clients, overseeing engagements from planning through issuance.
- ♦ Performed risk assessments and fieldwork, reviewed financials, and presented findings to management and boards.
- ♦ Prepared technical accounting and tax research memos to support audit conclusions and client advisory needs.
- ♦ Directed tax planning and compliance for corporations, partnerships, individuals, trusts, and estates, including preparation and review of ASC 740 deferred tax calculations.
- ♦ Responded to federal, state, and local tax notices and performed research on complex tax issues.
- ♦ Assisted with litigation support, forensic accounting, surety claims, and funds control services.

### Contact Us

**Blythe Global Advisors, LLC**

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