



Home Builders Association of Western Michigan
5700 West Michigan Avenue
Kalamazoo, MI 49009

(269) 375-4225
Fax: (269) 375-6493
www.kalamazoohomepage.com

Home Builders Association of Western Michigan Government Relations Committee

INFORMATION REQUEST FORM

Candidate Name: Kevin Whiteford

Street address: 7186 Point Betsie Drive

City: South Haven State: MI Zip: 49090

Mailing address (if different from above): 404 Broadway Street, South Haven, MI 49090

County: Allegan Duration at Current Residence: 1 Year
16 years at a nearby address in South Haven

Phone: 269-999-6726 E-mail: Kevin@whitefordwealth.com

LinkedIn: Kevin-S.Whiteford-cpa-mst-889a6829 Website: https://www.votekevinwhiteford.com

Campaign committee name: CTE Kevin Whiteford

Campaign committee address: 404 Broadway Street, South Haven, MI 49090

Current Occupation: Financial Advisor, Real Estate owner

Candidacy for which office? 38th District State House of Representative Incumbent? No

Please list endorsements received to date: Dan Abbott - County Sheriff, Frank Baker County Sheriff
Robert Genetski - County Clerk, Gregory Muncey - City Council Member, Allen Overhiser - Farmer/Trap Supervisor, Wes Smigielski - Police Chief, MANY MORE

MISSION STATEMENT

The HBA exists so that members of the residential construction industry can ethically and efficiently provide our communities with safe, quality, and affordable housing. As a membership association, we're dedicated to helping our members grow and prosper while being a local resource for homeowners to find quality services and reliable contractors.



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HBA of Western Michigan
local candidate informational questions

1) Are you currently serving in the MI Legislature? If No, have you ever run for elective office? List any offices you've previously run for and convey the outcome.

No
DDA City of South Haven - 6 years
Republican Delegate, Casco Twp

2) What is your background (education, employment, other relevant experience)?

CPA, Financial Adviser, Real Estate Developer - Rehab Commercial & Residential
Education - See Attached

3) If elected/re-elected, what top concern(s) would you address first?

Affordable Housing - I already proved we can do it in Mass quantities along the Lake Michigan - SW Michigan

4) Why should the residential, construction and remodeling community support your candidacy?

I will understand the industry most likely better than anyone currently in office. I have a family team under many Real Estate Corporate Names located in Corporate Office in South Haven
(2 sons - their spouses)
1 nephew

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5) Why should the residential, construction and remodeling community NOT support your opponent's candidacy (if applicable)?

I will have a much better understanding. The Republican Opponent is a Realtor, which we match plus some, by my oldest son, Scott

6) Today, the home building and remodeling community is confronted with a wide array of complex issues. Within your community, what resource(s) do you look to for advice/counsel?

*Banks, City Managers / Supervisors
will work w/ Michigan Mfg Assoc to link New Business w/
New Housing*

7) Government regulations, policies, ordinances and codes are trending issues for the residential, construction and remodeling industry. How would you reduce regulations to better support the promotion of additional housing?

*Because I understand and have physically experience it, I will totally understand the problems, that exist.
Utilizing outside contractors as Bldg inspectors w/ very little knowledge
Needs to change.*

8) What is your philosophy on residential development, impact fees, property taxes, etc.?

*Impact Fees are way too high, we need MORE residential development
Property Taxes are too high along IN Lake.*

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9) If elected/re-elected, what steps would you take to encourage and support new housing development?

A Huge supporter of it, Already Ready to tackle as a high priority

10) What is your position on property owners' rights regarding development, redevelopment and remodeling?

Property owner's rights are constantly getting infringed on by Govt over reach.

11) How would you define positive housing market growth within the community?

We Need much more affordable housing, spearheaded by someone who knows all the problems on why it is Not happening,

12) How can the HBA of Western Michigan assist you if elected/re-elected?

I would love to have 1 or 2 key contacts at my constant access for needed advice.

The Government Relations Committee appreciates the time you've taken to complete this form. Please know that your participation will help HBA members make an informed decision on election day.

Please mail the completed form to the address above, e-mail it to MeganW@hbawmi.com or fax it to (269) 375-6493.

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KEVIN S. WHITEFORD, CPA MST

SERIES 24,7,66

7258 Beverly Drive

South Haven, MI 49090

269-999-6726

kevin@whitefordwealth.com

Work Experience

OWNER/PRESIDENT - WHITEFORD WEALTH MANAGEMENT, INC.

South Haven, MI

October 1999 – Present

Own and manage a financial and investment planning practice that assists individual and business clients located and operating in 19 states. Currently considered to be one of the leading agents for a major national broker dealer. Prepare and manage business 401k, SEP, and Simple retirement plans for various types of corporations. Create and manage simple to complex estate plans for individuals as well as their families.

OWNER/PRESIDENT - WHITEFORD TAX AND FINANCIAL SERVICES, LTD.

South Haven, MI

November 1997 – Present

Own and manage a tax and accounting practice that currently serves various corporations and individuals located throughout the country. Manage the preparation of business and individual tax returns.

OWNER/PRESIDENT - WHITEFORD PROPERTIES, INC.

South Haven, MI

December 2002 - Present

General contract and build commercial real estate located in Illinois and Michigan. Manage the rent and tenant build-outs as they occur.

PART-TIME FACULTY - DEPAUL UNIVERSITY

Chicago, IL

June 1997 - December 2001

Taught two courses offered in the M.S.T. Program.

-State and Local Income Taxes

-Federal Tax Research

TAX MANAGER - BLACKMAN KALICK

Chicago, IL

February 1997 - November 1997

Managed the state and local tax department of an international public accounting firm. Manage the firms state and local tax issues that needed to be researched or dealt with for their entire client base that may have occurred in any state jurisdiction within the United States. Also handled some of the firm's international tax issues that came up with their client base.

TAX DIRECTOR - PANDUIT CORPORATION

Tinley Park, IL

November 1991 - February 1997

Managed all international, federal and state taxes for a privately held company, which had activity in 50 states and 33 countries with approximately \$500 million in sales. State level responsibilities included state and local sales and use taxes, personal property taxes, and real estate taxes. I coordinated all tax research projects, as well as all audits and inquiries with the IRS, State and local auditors. Researching and restructuring the international transfer pricing system used by the company globally.

Responsibilities also included all owner involved joint ventures and related individual taxes. I also handled tax department's annual budget and staff.

This also included researching, from a business and tax perspective, the optimum site locations for the company's European and South American central warehouses. Assisted in the start-up of sales and manufacturing locations in Costa Rica and Malaysia

TAX SUPERVISOR, KPMG PEAT MARWICK

Chicago, IL

January 1991 - November 1991

Reviewed and prepared federal and state tax returns including federal form 5471 for foreign corporations. Responsibilities included the proportion of a large SEC consolidated corporate tax return, a large S-Corporate tax return and all related shareholder tax returns. Handled a majority of the foreign and state tax issues that client's were involved with for the real estate division of KPMG.

TAX SENIOR, LAVENTHOL & HORWATH

Chicago, IL

November 1988 - November 1990

Reviewed and prepared corporate, partnership and individual tax returns. Predominantly work consisted of corporate federal tax and multi state tax returns and researching various tax issues. Handled numerous international tax issues that were incurred by the firm's client base.

SENIOR AUDITOR, TOUCHE ROSS & COMPANY

Chicago, IL

September 1986 - November 1988

Supervised the planning and administration of commercial audit engagements with an emphasis on manufacturing, for clients ranging in size from Fortune 500 companies to those with sales of \$10 million, as well as large, non-profit organizations.

Education

DePaul University – Chicago, IL

Master of Science in Taxation - December 1994

Northern Illinois University - DeKalb, IL

Bachelor of Science in Accountancy - May 1986

Passed C.P.A exam - May 1986

**Kevin S. Whiteford, C.P.A., M.S.T.
Series 24, 7 and 66**

Kevin S. Whiteford is currently the owner and operator of multiple small businesses with the two main businesses being Whiteford Wealth Management, Inc., and Whiteford Properties Inc., located in South Haven, Michigan.

Kevin started up his investment and financial planning business in December 1999 and is licensed with a series 7, series 66 and series 24. Kevin now provides various services needed to meet the needs of his clients in all areas of their finances by providing various types of investments and life insurance options. Kevin utilizes his tax knowledge and international business experience when assisting businesses and individuals meet their retirement investment needs. Whiteford Wealth Management, Inc. currently serves clients in 28 states who operate businesses all over the country.

Kevin started his career by receiving his B.S. in accounting from Northern Illinois University in 1986 and passed the C.P.A. exam in May of that same year. Kevin spent time in audit and tax with a few of the largest accounting firms in the world. Kevin also spent time in industry with a manufacturing company where he was fully in charge of the tax department which did business in 50 states and 33 countries. Later in Kevin's career he further his education at DePaul University to obtain his M.S.T. (Master of Science in Taxation). In November 1997, Kevin decided to start up his own firm servicing various taxpayers specializing in small businesses and the business owners. In addition, during the years from June 1997 through December 2001 Kevin taught two courses in the M.S.T. program where he taught Federal and State tax law in a department of a major university.

While Kevin has been busy pursuing his career objectives, he has been active in speaking and performing at various college and high school classrooms throughout the State of Michigan where he loves giving back to the children of the Next Generation. Kevin currently sits on the board of directors for the DDA for the City of South Haven. Kevin resides in South Haven, Michigan with his wife Mary, their three children, Scott (wife Kary), Alisa and Ken, along with his five grandchildren Reese, Beckham, Novak, Wellington and Hazel, all of whom live and are prospering in the State of Michigan as well.



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AaronH@hbawmi.com

May 8, 2024

Dear Kevin Whiteford,

On behalf of the Home Builders Association of Western Michigan's (HBAWMI) builder and associate members, I am writing to invite you to a bipartisan 'Meet the Candidates Breakfast' to talk about residential construction and housing attainability. **It will be held at the Fetzer Center on WMU's campus, from 8:00 to 10:00 a.m. on Friday, June 7th.** We would be honored to have you join us to serve on a panel moderated by our HBA of Michigan Executive Vice President for Government Relations, Dawn Crandall. A short Q & A session will follow.

As you know, Governor Whitmer wants to "Build, Baby, Build!" The barriers we face as builders when it comes to building attainable housing comes down to three things: 1) Increased costs due to materials and labor, 2) increased costs associated with proposed code changes and 3) unintended consequences of well-intended legislation.

This is a great event for you to share your legislative priorities and ideas to work towards solving the housing crisis we face in Michigan. This event will help our members make an informed decision when they head to the polls in August and November.

To aid you in your decision to join us, we have included a sneak peek questionnaire that will better inform our members. Submitted questionnaires can be viewed on HBA's 2024 Election website.

Please contact **Megan Wertz** at MeganW@hbawmi.com or **269-375-4225** for more information.

Thank you for your time spent considering our invitation. We hope to see you on June 7th.

Sincerely,

Aaron Hovestadt
CEO, Home Builders Association of Western Michigan
AaronH@hbawmi.com
269-375-4225 x 104

CC: 2024 Candidate Questionnaire



Building Homes, Strengthening Communities

