

Dan Bomhoff, CPA, CGMA

Partner

Oklahoma City

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Dan is a partner at HoganTaylor and leads the firm's Estate, Gift, and Trust Tax Team. In addition to his leadership role, he serves on the firm's Tax Quality Control Committee, helping guide technical tax standards and review processes across the firm's tax practice. He advises high-net-worth and ultra-high-net-worth families, family offices, and closely held business owners on complex tax and wealth-transfer planning strategies. With more than 20 years of experience in taxation, Dan works closely with multi-generational families and privately-held businesses to design and implement sophisticated planning structures that preserve wealth and minimize tax exposure.

His work frequently involves estate and gift tax planning, wealth transfer strategies, trust planning, and the structuring of family limited partnerships. He also advises clients on advanced planning techniques such as Spousal Lifetime Access Trusts and Intentionally Defective Grantor Trusts, as well as business succession planning and family office structure planning. Dan frequently collaborates with attorneys, investment advisors, and family office professionals to coordinate tax-efficient wealth and estate planning strategies.

Before joining HoganTaylor in 2013, Dan spent three years at an oilfield services company and prior to that, spent eight years with Grant Thornton.

Representative Experience

- Represents business and individual clients before the Internal Revenue Service and various state tax authorities regarding a wide variety of examinations on income tax returns.
- Assists clients in various tax planning opportunities.
- Assists clients on both sides of mergers and acquisitions in determining the tax effects of the transaction including advising on structuring the transactions in the most tax-efficient manner.
- Counsels clients on tax planning for both income tax and estate and gift tax.

Certifications & Honors

- Certified Public Accountant (CPA)
- Chartered Global Management Accountant (CGMA)
- Chartered Advisor in Philanthropy
- OSCPA Trailblazer Award, 2015

Professional & Civic Affiliations

- Member, American Institute of Certified Public Accountants (AICPA)
- Member, Oklahoma Society of Certified Public Accountants (OSCPA)
- Former President, Vice President, Treasurer, Board Member, Oklahoma 4-H Foundation
- Former Treasurer and Board Member, Okarche Educational Foundation
- Member, Oklahoma City Estate Planning Council

Education

- Master of Science, Accounting with emphasis in Tax, Oklahoma State University
- Bachelor of Science, Agricultural Economics and Accounting, Oklahoma State University