

Jason Shultz, CPA

Partner

Tulsa

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Jason Shultz is the Partner of Innovation at HoganTaylor LLP, where he works within the Firm's Strategic Services group to drive innovation, technology adoption, and firm-wide transformation initiatives.

Jason's work sits at the intersection of people, technology, and strategy, focusing on aligning teams, tools, and vision to drive meaningful and scalable change across the Firm. He focuses on translating emerging technologies; including automation, data analytics, and artificial intelligence – into practical, real-world applications across audit, tax, and advisory services. He also plays a key role in shaping the Firm's approach to AI governance, adoption, and responsible use.

Jason leads the development of multiple proprietary tools and platforms that support both internal teams and clients. Most notably, Jason serves as Executive Director of myPortal.team, a secure document transfer and collaboration platform developed by HoganTaylor and used by firms nationwide. Solutions developed under his leadership are actively used across the Firm and by external CPA firms, reflecting a broader commitment to building scalable, impactful technology within the profession.

In addition to his work at HoganTaylor, Jason serves as a board member of Momentum3, LLC, where he helps guide the development of custom software and digital solutions tailored to the middle market; bringing enterprise-level capabilities to organizations that have historically lacked access to them.

Jason began his career at Deloitte & Touche, where he served large public and private companies. He brings that foundation into his current role, combining technical accounting knowledge with a forward-looking approach to innovation, product development, and firm strategy.

Representative Experience

- Leading firm-wide innovation strategy and execution
- Developing and scaling proprietary technology solutions for internal and external use
- Driving adoption of automation, data analytics, and AI across service lines
- Advising firm leadership on strategic technology investments and transformation initiatives
- Establishing frameworks for innovation, governance, and continuous improvement

Certifications & Honors

- Certified Public Accountant

Professional & Civic Affiliations

- Member, American Institute of Certified Public Accountants (AICPA)
- Member, Oklahoma Society of Certified Public Accountants, Technology Committee

Education

- Bachelor of Science, Accounting, Oklahoma State University