

Lou Ann Gibson, CPA, ABV, CVA, MAFF

Partner

Tulsa

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Lou Ann is a CPA with more than 35 years of public accounting experience in specialized tax, financial, and advisory services to privately held businesses, business owners, wealthy families, and not-for-profit organizations. Currently, she focuses on estate and gift tax planning and compliance.

She has advised closely-held organizations on business structure, budgeting, wealth transfer planning, tax strategy, succession planning, and asset protection, helping clients strengthen both business and personal financial outcomes. She also brings more than 20 years of valuation experience, helping clients determine and defend the value of their businesses. She is among the first in the nation to earn the National Association of Certified Valuation Analysts Certified Valuation Analysts (CVA) designation. She also holds Accredited Business Valuation (ABV) and Master Analyst in Financial Forensics (MAFF) credentials, placing her among a select group of valuation professionals nationwide.

Lou Ann has supported clients in litigation through depositions, testimony, and valuation defense, including matters involving the IRS. She is recognized by courts and attorneys in her field and has served as Special Master and court appointed neutral in numerous litigated matters.

Representative Experience

- Counseled a not-for-profit entity through a governance restructuring that reduced IRS exposure and minimized the risk of nonprofit status revocation, enabling more effective use of assets valued at more than \$12M to meet their charitable objectives.
- Consulted with and reviewed the tax return for the nation's largest community foundation.
- Assisted clients in transferring hundreds of millions of dollars to the next generation by developing and implementing estate plans using charitable lead and remainder trusts, private annuities, sales to defective grantor trusts, and gifts to family investment companies, while providing comprehensive transfer strategies tailored to complex wealth planning needs.

- Represented business and individual clients before the Internal Revenue Service and various tax state authorities.
- Provided expert witness service to attorneys in litigated matters involving financial disputes.
- Assisted attorneys and their clients in divorce cases by validating support and asset division through best practice methodologies, including identification of marital assets and preparation of multi-year income and expense projections based on investable assets and client developed budgets.
- Provided valuation services for a consolidated corporation valued at more than \$100M, involving multiple businesses across industry segments and assets including hotels, real estate, and mines.
- Served as Special Master in a class action lawsuit involving a settlement award of more than \$2M.

Certifications & Honors

- Certified Public Accountant (CPA)
- Certified Valuation Analyst (CVA)
- Accredited Business Valuation (ABV)
- Master Analyst in Financial Forensics (MAFF)
- The Journal Record's Fifty Making a Difference Honoree, 2014

Professional & Civic Affiliations

- Member, American Institute of Certified Public Accountants (AICPA)
- Member, Oklahoma Society of Certified Public Accountants (OSCPA)
- Member, National Association of Certified Valuators & Analysts (NACVA)
- Former Chair, OSCP Business Valuation/Forensic & Litigation Support Committee
- Former President, TOSCPA Chapter
- Former President, Emeritus Board Member, Parent Child Center of Tulsa
- Board of Directors, Tulsa Ballet Theatre, Inc.
- Former Board Member, Camp Fire Boys and Girls
- Former Vice President, Chairman of the Endowment Committee, and Board Member, Tulsa Opera Inc.

Education

- Bachelor of Accountancy, University of Oklahoma

Speaking Engagements

- Presenter, Oklahoma Conference on Nonprofit Law & Finance - Form 990-PF - Private Foundation Highlights - February 2015
- Presenter, TOSCPA - Business Valuation Update for CPAs - November 2014
- Presenter, OBA Family Law Section CLE - A Case Study in Valuing a Company - Do's and Do Not's - May 2013
- Presenter, 7th Annual TCBA Family Law Section CLE
- Presenter, The Verdict, Cox Channel 3 - Making Your Business More Valuable - July 2012
- Presenter, American Women's Society of CPAs - Fundamentals of Business Valuation - October 2008
- Presenter, Oklahoma Bar Association - She Got the Goldmine, I Got the Shaft: Surviving the Numbers in Divorce - September 2011
- Presenter, American Women's Society of CPAs - Basics of Business Valuation - January 2008