

# Tony Otto, CPA

## Partner

### Tulsa

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Tony Otto has more than 35 years of experience in the area of taxation with an emphasis on closely-held organizations and family wealth. His experience encompasses a broad range of industry segments including oil and gas, manufacturing and distribution, construction, personal service, and trucking. He has also developed considerable expertise in the areas of gift and estate planning.

In addition to his expertise in tax, Tony carries the Accredited in Business Valuation (ABV) credential accredited by the American Institute of Certified Public Accountants (AICPA). ABV credential holders have a specific experience, education and examination requirement that sets them apart from other CPAs with respect to their knowledge and expertise in business valuation. He is also a Certified Valuation Analyst (CVA) certified by the National Association of Certified Valuators and Analysts (NACVA).

Tony serves on the operations committee to the firm's Board of Directors. He is also on the team of HT Disciplined Investments, L.L.C., a wholly owned subsidiary of HoganTaylor that offers financial planning and investment management services.

Tony has been an active volunteer in the community. He has served in the Tulsa Chapter of the Oklahoma Society of CPA's and on the Board of Directors for the Susan G. Komen for the Cure Tulsa Affiliate. Tony also served his former church in numerous financial capacities.

Prior to becoming a member of HoganTaylor in 1993, Tony worked for a local practitioner where he performed tax planning and compliance projects as well as accounting services for numerous family owned businesses located in northeast Oklahoma.

### Representative Experience

- Represented numerous clients before the Internal Revenue Service and state taxing authorities with respect to examinations of individual and business income tax returns.
- Oversees tax planning and compliance for Companies of all sizes.
- Performed valuations in numerous industries, including manufacturing, aerospace, healthcare, investment companies, oil and gas, and many others.

- Performed valuations of financial instruments with values in excess of \$1 billion.
- Counseled clients on tax planning, especially as it pertains to lessening their exposure to both estate tax and income tax.
- Assisted in the implementation of sophisticated estate plans using the latest in estate planning techniques.

## Certifications & Honors

- Certified Public Accountant (CPA)
- Accredited in Business Valuation (ABV)
- Certified Valuation Analyst (CVA)

## Professional & Civic Affiliations

- Member, American Institute of Certified Public Accountants
- Member, Oklahoma Society of Certified Public Accountants
- Member, Tulsa Chapter of the Oklahoma Society of CPA's,
- Former Board Member and Treasurer, Susan G. Komen for the Cure - Tulsa Affiliate
- Member, Rotary Club of Tulsa
- Board Member and Treasurer, OCCJ

## Education

- Bachelor of Science and Bachelor of Arts, Accounting and Business Administration, Bethel College, with Honors