



## ROBERT WAGNER, CPA PARTNER

### Tulsa

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Robert leads the Advisory practice at HoganTaylor. He has more than 30 years of accounting and executive experience. Prior to joining HoganTaylor, Robert was co-founder of a CFO consulting practice. This practice was merged into HoganTaylor in 2013. His additional experience includes serving as CFO of a \$100MM publicly-held technology company for 22 years, as well as working as an auditor for Price Waterhouse.

## REPRESENTATIVE EXPERIENCE

- Provided fractional CFO and financial consulting services to companies ranging from \$3MM to \$100MM+ in annual revenues
- Managed the acquisition of businesses from negotiation of letters of intent through final purchase agreement and subsequent integration of operations
- Experience arranging senior debt financings, managing working capital, business turnarounds, preparing SEC filings, and improving business processes to trim administrative costs and improve cash flows
- Served as CFO under six different CEOs, all with varying business and financial experience
- Managed human resource and benefits functions, order processing, contract administration, and litigation

## CERTIFICATIONS & HONORS

- Certified Public Accountant (CPA) in Oklahoma

## PROFESSIONAL & CIVIC AFFILIATIONS

- American Institute of Certified Public Accountants (AICPA), Member
- Oklahoma Society of Certified Public Accountants (OSCPA), member

## EDUCATION

- B.S., Accounting, Oklahoma State University

## SPEAKING ENGAGEMENTS & PUBLISHED ARTICLES

- Owner's Briefing: Exiting Your Business – Selling from a Position of Strength: "Value Drivers", Presenter & Panelist, September 2018

- Expert Webcast: “Exit Alternatives for a Middle-Market Company”, Panelist, August 2018
- Expert Webcast: “What Business Owner’s Need to Know About Successfully Transitioning Their Company”, Panelist, May 2018
- Expert Webcast: “Capital Raising Alternatives for a Middle-Market Company, Panelist, March 2018
- Lower Middle Market Investment Summit , “Financial Regulation / Deregulation” panelist, May 2017
- Oklahoma Society of CPA’s Members in Industry Conference , presenter, “Real-World CFO for Small & Mid-sized Businesses”, September 2012
- B.Riley and Southwest IDEAS Investor Conferences, Company presentations 2010 & 2011
- Publishes the monthly Advisory Insights blog for HoganTaylor