ESTATE PLANNING SERVICES

At HoganTaylor, we know you've worked hard for your success and leaving a lasting legacy for future generations is paramount. To achieve a lasting legacy, you need comprehensive estate planning advice that is customized for your unique goals.

Today's financial environment is characterized by change and regulation, which makes planning exceedingly complex. Our team of business advisors and CPAs seeks to elevate the work of your existing advisors through enhanced wealth succession strategies, innovative planning tools, and the financial guidance you need to achieve your long-term goals.

We believe our role as financial stewards starts with developing a clear understanding of your objectives and the unique challenges that stand in the way of achieving them. We're cognizant of the important role communication plays in the planning process, which is why we work closely and collaboratively with our clients, their families, and their existing advisors to develop the right plan of action and concisely communicate its impact.

For decades, HoganTaylor estate planning professionals have leveraged their tax and business advisory expertise to help individuals like you accomplish their goals and minimize their tax burden.

WHY CONSULT WITH HOGANTAYLOR?

You have an attorney, so why do you need to speak to a business advisory and public accounting firm?

We work closely and collaboratively with your existing advisors, providing valuable consulting services that empower them to develop unique solutions and execute on your behalf. Most commonly, we support your existing advisors in the following ways:

- Estate and gift tax analysis and compliance
- Business valuations
- Estate and gift tax modeling
- Estate and gift tax research

TECHNOLOGY THAT ELEVATES

We are a leader in leveraging technology in the delivery of services to our clients. Our investment in technology includes Bloomberg BNA Estate & Gift Tax Planner™, an advanced tax software that includes built-in tax knowledge, automatic calculations, detailed projections, and compelling data visualization.

The BNA Estate & Gift Tax Planner™ software, combined with our knowledge of your objectives, empowers you to achieve your financial goals by providing you with highly accurate strategic plans and detailed tax projections.

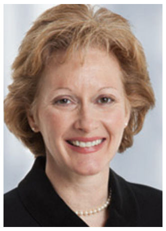
CONSULTING

- Charitable gift planning
- Estate and gift tax planning
- Generation-skipping transfer tax
- Structures for making gifts
- Irrevocable life insurance trusts
- Qualified personal residence trusts
- Grantor retained annuity trusts
- Grantor retained income trusts
- Family limited partnerships
- Family limited-liability companies
- Intrafamily sales
- "Intentionally defective" irrevocable trusts
- Business valuation

COMPLIANCE

- Estate
- Charitable
- Fiduciary
- Gift
- Income tax issues

ESTATE PLANNING SERVICES LEAD



Lou Ann, CPA/ABV, CVA, MAFF

Lou Ann Gibson leads HoganTaylor's Estate Planning Services practice. She is an accomplished CPA whose career includes more than 30 years of public accounting experience providing specialized tax, financial, and advisory services to privately held businesses, business owners, wealthy families and not-for-profit organizations.

Lou Ann also has more than 20 years of experience providing valuation services that have helped her clients ascertain, and substantiate, the value of their enterprises. She was among the first in the nation to receive a Certified Valuation Analyst (CVA) designation by the National Association of Certified Valuation Analysts, and since then has earned the Accredited Business Valuation (ABV) and Master Analyst in Financial Forensics (MAFF) designations, putting her in a small group of elite professionals nationwide.

ESTATE PLANNING SERVICES LEADERSHIP TEAM

Pat Milligan, CPA, PFS, CGMA

Dan Bomhoff, CPA, CGMA

Jeff Hearne, CPA

Lyndel Lackey, CPA, CGMA

ABOUT HOGANTAYLOR

HoganTaylor is one of the largest business advisory and public accounting firms in Oklahoma and Arkansas. In addition to Estate Planning services, HoganTaylor has many other practice groups made up of knowledge experts in important, highly specialized areas of accounting.

SERVICES

- Accounting Solutions
- Advisory
- Assurance
- Business Valuation
- Employee Benefit Plans
- Human Capital
- Information Technology
- Litigation Support
- Outsourced CFO Services
- Risk Assurance
- Tax
- Wealth Management

INDUSTRIES

- Collective Investment Funds
- Construction
- Energy
- Financial Institutions
- Insurance
- Manufacturing & Distribution
- Nonprofit
- Retail
- Transportation

BDO ALLIANCE USA

HoganTaylor is an independent member of the BDO Alliance USA and is able to access the resources of BDO USA, LLP and its trusted network throughout the world.

AN INDEPENDENT MEMBER OF BDO ALLIANCE USA

CONTACT INFORMATION

For additional information about HoganTaylor's Estate Planning Services, please contact Lou Ann Gibson at 918.745.2333 or lgibson@hogantaylor.com

HoganTaylor LLP
CPAs + ADVISORS

hogantaylor.com

TULSA
2222 South Utica Pl., Ste. 200
Tulsa, OK 74114
Phone: 918.745.2333

OKLAHOMA CITY
11600 Broadway Ext., Ste. 300
Oklahoma City, OK 73114
Phone: 405.848.2020

FAYETTEVILLE
688 East Millsap Rd., Ste. 203
Fayetteville, AR 72703
Phone: 479.521.9191

LITTLE ROCK
11300 Cantrell Road, Suite 301
Little Rock, AR 72212
Phone: 501.227.5800

043019