

Pat Milligan, CPA, PFS, CGMA

Partner

Tulsa

2222 S. Utica Pl., Suite 200,
Tulsa, OK 74114
pmilligan@hogantaylor.com
918.745.2333



Pat Milligan 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, construction and trucking. He has also developed considerable expertise in the areas of retirement, estate and personal financial planning.

In addition to his expertise in tax, Pat carries the Personal Financial Specialist (PFS) credential accredited by the American Institute of Certified Public Accountants (AICPA). PFS 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 personal financial planning. He is also a Chartered Global Management Accountant (CGMA), a designation accredited by the AICPA and Chartered Institute of Management Accounts for individuals with concentrated experience and education in the management accounting arena. He is currently serving his third term as a member of the firm's Board of Directors.

Pat was designated as one of the top 100 most influential practitioners by CPA Magazine in 2005 and 2006. He also won Gold Pen awards in 2008 and 2011 for the most outstanding article published in the CPAFOCUS Magazine during the previous year. In 2009, Pat was recognized for his professional and civic contributions to the state when he became the 50th inductee into the Oklahoma Accounting Hall of Fame. An active member of the Oklahoma Society of CPAs, Pat is a past president of the organization both at the Tulsa chapter and statewide levels. He has served on multiple OSCPAs committees, including chairing the Budget & Finance, Continuing Professional Education, Nominations and Personal Financial Planning Committees. Pat currently serves on the Professional Ethics, Personal Financial Planning and Human Resources Committees. He is also currently serving as Oklahoma's elected governing council representative for the American Institute of Certified Public Accountants. Pat has been an active volunteer on numerous Tulsa Area United Way campaigns, is a former chair of the Board of Directors for the Tulsa Area Chapter of the American Heart Association and is the treasurer for the Tulsa Day Center for the Homeless.

Prior to becoming a member of HoganTaylor in 1984, Pat worked for Arthur Andersen & Co. where he supervised tax planning and compliance projects for numerous publicly traded and large family owned businesses located in northeast Oklahoma and northwest Arkansas.

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.
- Managed municipal bond portfolio valued in excess of \$50 million.
- Oversaw the estate tax return preparation and post mortem estate tax planning for estates ranging in size from \$1 – 25 million.
- Co-managed family office with assets valued in excess of \$100 million.
- Counseled clients on tax planning, especially as it pertains to lessening their exposure to both estate tax and income tax.
- Assisted in the preparation of comprehensive personal financial plans and designed investment portfolios for clients with diverse financial backgrounds and objectives.

Certifications & Honors

- Certified Public Accountant
- Personal Financial Specialist (PFS)
- Chartered Global Management Accountant (CGMA)
- 50th Member, Oklahoma Accounting Hall of Fame, 2009

Professional & Civic Affiliations

- American Institute of Certified Public Accountants, Oklahoma elected council representative
- Oklahoma Society of Certified Public Accountants
- American Heart Association, Tulsa Area Chapter, former Board of Directors Chair
- Tulsa Area United Way, Former Cabinet Member
- Tulsa Day Center for the Homeless, Treasurer

Education

- B.S., Accounting, East Central University, with Honors

Speaking engagements & Published Articles

- Government and AICPA Part Ways with Respect to the Tax Return Position Standard, CPA Focus Magazine, November/December 2007
- Time to Make Those Late-Year Tax Decisions, Tulsa Business Journal, October 2009

- IRS Pursues Broader Oversight Over Tax Practitioners, CPA Focus Magazine, May/June 2010
- Are You a Personal Financial Planner? CPA FOCUS Magazine, September/October 2014
- New Client Confidentiality Guidance Looms on the Horizon, CPA FOCUS Magazine, September/October 2016
- Presenter, Understanding the Domestic Production Activities Deduction, Tulsa Chapter, OSCPA, January 2007
- Presenter, New Developments in the Tax Return Position Standards, Green Country Chapter, American Woman's Society of CPAs, September 2008
- Panelist, OSCPA Financial Planning Conference, October 2009
- Presenter, Professional Ethics for CPAs with Tax Emphasis, Tulsa Chapter, OSCPA, June 2010
- Panelist, Professional Ethics Panel, Tulsa Chapter, OSCPA, October 2010