

Annie Tran, CPA

Senior Advisor

Tulsa

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Annie Tran joined HoganTaylor Wealth in 2018 after working with a family office providing diverse accounting and investment services. She helps clients develop & implement comprehensive financial plans that address their unique goals and circumstances.

Annie has considerable experience working with high net worth family groups on tax compliance, estate planning, and trust operations. She was a Tax Manager at HoganTaylor LLP serving as the tax lead on several nonprofits including educational institutions, community foundations, museums and other charitable organizations. Annie has more than 15 years of public accounting experience in both assurance and tax, as well as industry experience with governmental not-for-profits.

Annie is an Investment Adviser Representative of HoganTaylor Wealth. She earned a Bachelor of Science in Accounting from the University of Oklahoma.

Certifications & Honors

- Certified Public Accountant (CPA)
- Oklahoma Society of Certified Public Accountants Trailblazer Award, 2015 Recipient

Professional & Civic Affiliations

- American Institute of Certified Public Accountants (AICPA), Member
- Oklahoma Society of Certified Public Accountants (OSCPA), Member
- Junior League Of Tulsa, Inc.

Education

- B.S., Accounting, University of Oklahoma

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