

Baker Tilly welcomes Partner Tina Milligan to the Private Client Group



Candor. Insight. Results.

Tina Milligan is a partner in the Private Client Group and recently joined Baker Tilly after eight years with financial institutions where she advised high net worth clients regarding tax, wealth transfer, philanthropic, insurance, investment, and other advanced financial planning matters. Prior to her time with financial institutions, Tina worked with business owners, corporate executives, and family offices on their tax planning as part of a national accounting firm. She also has presented and published on a wide range of financial and tax planning topics.



Tina specializes in estate, gift, fiduciary, and individual income tax planning, as well as retirement, corporate executive, business succession, wealth transfer, and charitable planning. She has worked closely with individuals and family offices to:

- > Advise on business owner succession planning, executive compensation, and retirement planning,
- > Advise on and model estate disposition, wealth transfer, charitable, and other advanced financial planning techniques
- > Coordinate implementation of estate, wealth transfer, and charitable planning with clients' other advisors
- > Provide financial modeling to guide cash flow, insurance, retirement, and asset allocation planning
- > Research and develop proprietary marketing, presentation, and modeling materials for financial institutions and family offices regarding financial and tax planning topics

Experienced Baker Tilly Private Client Group advisors like Tina collaborate on every aspect of financial planning for individuals, from tax liabilities to charitable giving. As we learn about your interests, we research and recommend solutions that align complex financial options with your personal values and goals. Contact your Baker Tilly Tax Advisor or send an e-mail to tax@bakertilly.com for more information.

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