

**Tina Davis Milligan, CPA, PFS, MSA***Partner***312 729 8033****tina.milligan@bakertilly.com**

Tina Milligan, Partner with Baker Tilly Virchow Krause, LLP, is a member of the Private Client Group. She has more than 18 years of experience in estate, gift, fiduciary, and individual income tax planning, as well as retirement, corporate executive, business succession, wealth transfer, and charitable planning. Prior to joining the firm, Tina worked at financial institutions and a national accounting firm, helping clients with planning.

Specific experience

- > Develop proprietary materials and models regarding financial and tax planning for clients of financial institutions, law firms, and family offices
- > Advise, model, and coordinate implementation of wealth transfer and charitable techniques with client's advisory team
- > Financial planning modeling including cash flow, insurance, retirement, and asset allocation planning
- > Advise on business-owner succession and executive compensation and retirement planning

Industry involvement

- > Licensed Certified Public Accountant New York
- > American Institute of Certified Public Accountants
- > Chicago Estate Planning Council and Estate Planning Council of New York City
- > Roosevelt College of Business - Advisory Board
- > Women's Leadership and Mentoring Alliance - Treasurer
- > Winnetka Community Nursery School Board - Fundraising Treasurer

Education

Fort Lewis College
Bachelor of Science in Accounting

Roosevelt University
Master of Science in Accounting