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GeffenMesher



Billy M. Morgan, Jr., CPA  
Of Counsel

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#### KEY TO SUCCESS

“Always be thinking about ideas you can bring to your clients that will help their specific situation.”

#### SPECIALIZATIONS

Executive compensation  
Inventory taxation  
Planning for closely held companies  
Estate and gift planning  
S corporation taxation  
Business sale and purchase

#### INDUSTRY EXPERTISE

Dealer Services

#### PROFESSIONAL ORGANIZATIONS

American Institute of Certified Public Accountants  
Oregon Society of Certified Public Accountants

#### COMMUNITY INVOLVEMENT

Oregon Easter Seals

#### BACKGROUND

More than 40 years into a career that started in Nashville and has taken him to Portland, Billy Morgan sees everything through a broad view approach that circles back to the way he serves clients, no matter what industry they're in. “I believe you should go into any meeting prepared not only to meet a client where they're at, but to be able to offer ideas they might not have thought of. I'm happy to spend extra hours researching their situation, and come up to speed on new tax laws, in order to help them take advantage of incentives that may only be available for a short time.”

Billy understands that the speed at which laws change makes it increasingly difficult for almost any CPA to keep up. “Even when you have a broad base of knowledge, it's becoming more and more difficult to leverage off of it, especially when things change so drastically. What I try to tell younger folks is that you have to find the links between the laws themselves and where your clients are at. Then you need to connect the dots in a way that helps them reduce their tax burdens and plan effectively.” Billy credits his wife as having been a critical piece in his successful career. Beyond his work, he has volunteered his time with Oregon Easter Seals.

#### EDUCATION

Bachelor of Business Administration, Memphis State, 1970  
Certified Public Accountant, Oregon