Bill Hattox

Senior Manager

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Profile

Practice Group: Business Tax & Advisory

Major Practice Area: Corporate Transactions (Stock and Asset Purchases), Dispositions of Subsidiary Companies, Multi-State Tax Filings (Combined State Filings, Separate Filings, Apportionment and Allocation)

Industries Served: Real Estate, Professional Services, Manufacturing & Distribution, Construction

Professional & Community Involvement: American Institute of Certified Public Accountants

Professional Background: Travis Wolff, LLP
Weaver, LLP
Hall & Co.
Squar Milner
Watson Pharmaceutical

Education: University of Texas at San Antonio (Bachelor of Business Administration, Accounting)

Credentials and Certifications: Certified Public Accountant (CPA), Texas and California

WHAT I KNOW

The tax landscape has become enormously complex, where making the right – or wrong – decision can have significant implications. Companies and business owners need trusted advisors who not only know the tax laws, but who understand their circumstances and goals. With the right insights, costs can be reduced and financial benefits maximized.

I work with business owners in providing proper guidance for helping them make financial decisions. I build relationships of trust, always demonstrating that I have their best interests in mind by delivering solid and reliable advice and recommendations. I take the time to listen, digest and understand my clients' goals, with a deep commitment to service and client satisfaction.

By coordinating and delivering using a team approach, and always thinking about new and better ways to address a situation, I am able to develop useful solutions for my clients. At the foundation of my working style is transparency and openness, which creates trust and mutual respect.

CLIENT SUCCESSES

I have helped businesses deal with a wide range of tax issues and strategies, saving tens of millions of dollars in tax through structuring, advising and implementing reorganizations, reviewing merger agreement, managing the filing of a favorable private letter ruling, generating refunds, designing, coordinating and implementing multi-state tax restructuring projects. But beyond the dollars and cents of my client successes is the success I have had in building trust and respect over time with my clients. This is really the greatest success of all.

ADDITIONAL INSIGHT

How has your professional experience shaped your thinking about your area of expertise?

I have come to see that my value and role is not just as an accountant but rather as more of a CFO/Advisor who continually develops the best solutions for clients.

How does entrepreneurial thinking play a role in your guidance to clients?

I do not believe there is any one answer for all occasions. Each client has unique needs and in order to add value you must continually seek unique solutions. Business is not black and white, it has many shades of gray, so thinking like an entrepreneur provides the flexibility to adjust to any situation.

What are some of the common biggest areas for improvement you see when you begin working with a new client?

Helping them recognize the importance of great records, building a strong team of advisors and getting them to trust those advisors' recommendations.