

Allyson B. Baumeister, CPA, CGMA

CliftonLarsonAllen LLP

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Fort Worth, TX

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Profile

Allyson works tirelessly for businesses of all sizes, maintaining a primary focus on business tax and consulting. She provides her clients with creative resolutions for technical tax issues and clearly interprets proposed and existing business tax law. Moreover, her thorough experience with trusts and estates allows her to deftly guide clients through the complicated legislation and the intricate processes involved in compliance, maximization of returns, and sustaining business and family wealth.

She first gained knowledge and experience working for several years in a national firm, in a small firm environment, and in solo practice. She was also a partner in a regional legacy firm for fifteen years prior to joining CLA. Her extensive tax experience bolsters CLA's talented staff and cultivates client relationships and makes her an invaluable member of the professional and civic communities.

Technical expertise

- Privately held businesses
- Business taxation & consulting
- Individual, trust and estate taxation
- Mergers & acquisitions
- Strategic business planning
- Business continuation, succession planning & exit strategies

Education/professional involvement

- Bachelor's of business administration graduating magna cum laude from Texas A&M University, College Station, TX
- American Institute of Certified Public Accountants
 - Board of Directors, 2009-2012
 - Council member, 2005-2012, 2014-present
 - CPA2Biz Trusted Business Advisor Instructor, 2007-2010
 - PCPS Executive Committee, 2008-2009
 - various other committees, 1997-present
- Chartered Global Management Accountant
- Texas Society of Certified Public Accountants
 - Chairman 2015-2016
 - Board of Directors, 1998-present
 - Executive Board (Treasurer) 2004-2005
 - Executive Board (Appointee), 2001-2002
 - Strategic Planning Committee Chair, 2007-2011
 - various other committee, 1992-present
- Fort Worth Chapter of TSCPA's
 - President 1999-2000
 - Board of Directors 1966-present
 - various other positions and committees, 1987-present

Civic organizations

- Fort Worth Chamber of Commerce
 - Vice-Chair, 2016-2017
 - Local Business Development Committee Chair, 2012-2016
 - Membership Committee Chair, 2008-2012
 - Treasurer, 2005-2008
 - Finance Committee, 2002-2008
 - Publications Task Force, 2003-2004
- First Presbyterian Church- Aledo, Elder and Treasurer, 2013-2016
- Red Cross Chisholm Trail Chapter, Planned Giving Committee, 2009-2012
- Junior League of Fort Worth, 1989-present (Sustainer starting 2002)
- YWCA of Fort Worth and Tarrant County, Finance Committee member
- Mayfest, Inc., Central Committee 1996-2002
- Faith Presbyterian Church-Fort Worth, Board of Trustees and Elder, 2001-2003
- Chisholm Trail Round-Up, Treasurer and Board of Directors, 1986-1992

Awards/honors

- Texas Society of CPAs
 - Special Recognition for her service to the CPA profession, 2014
 - LoneStar Pathfinder, 2002
 - Young CPA of the Year, 1996
 - Senate Resolution No. 329 from Senate of Texas in 1997 recorded her honor
- Fort Worth Chapter of TSCPA
 - CPA of the Year, 2011
 - Young CPA of the Year, 1994-1995
- Fort Worth Business Press
 - Great Women of Texas, 2009
 - 40 under 40, 1996
- YWCA Fort Worth and Tarrant County, Tribute to Women in Business, 2003