



Patricia Kalil Margarit, CPA  
Partner

*"Listening is a key factor to developing business solutions. Often, the results not only save tax dollars but meet a client's personal goals as well."*



### **Professional Focus**

- Specializes in providing tax, business consulting, and accounting services to privately-held businesses and their owners
- Provides consulting to a wide variety of industries including professional service firms, manufacturers, construction, real estate, and wholesale distributors
- Collaborates with clients on business succession, estate planning, and gifting ideas
- Represents business entities and individuals before Federal and State taxing authorities

### **Professional Experience**

- Joined Boulay, Heutmaker, Zibell & Co. P.L.L.P. in 1987
- Previous experience includes several years at a Big Four Firm

### **Education**

- University of North Dakota  
*B.S. Business Administration and Accounting*
- University of Minnesota  
*M.B.A. Finance*

### **Professional Activities**

- Minnesota Society of Certified Public Accountants  
*Named Outstanding Committee Chair*
- American Institute of Certified Public Accountants
- ESOP Association

### **Community Involvement**

- Our Lady of Grace Church and School
- Edina Country Club

### **Accomplishments**

- Elijah Watts Sells Award