



Patricia Kalil Margarit, CPA

Partner

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"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."

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, manufacturing, oil and gas, real estate, and wholesale distribution
- Collaborates with clients on business succession, estate planning, and gifting ideas
- Represents business entities and individuals before Federal and State taxing authorities

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
- Minnesota/Dakotas Chapter of the ESOP Association

Community Involvement

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

Achievements

- Elijah Watts Sells Award
National awarded for achievement on CPA exam