

LONI E. WINKLER



Loni is a leading member of the tax department and has more than 15 years of experience in public accounting.

PROFESSIONAL EXPERIENCE:

- Provides professional attest, tax and business consulting services to privately held businesses
- Extensive experience in corporate and flow-through entity federal and multi-state taxations
- Manages a group of tax professionals in areas of individual, corporate, and state and local taxation
- Monitors client tax reporting requirements, tax law changes, application and liabilities
- Assists business owners, CFOs and controllers in developing and implementing innovative business strategies to minimize risk, maximize profits, preserve wealth and reduce taxes

BACKGROUND:

- Licensed CPA in the state of Michigan
- M.S. in Accounting Information Systems, Eastern Michigan University
- B.S. in Accounting information Systems, Eastern Michigan University

RECOGNITIONS:

- Recipient of the 2020 TechServe “Supplier Excellence” award
- Recognized as “Notable Women in Finance”, Crain’s Detroit Business, 2018

THOUGHT LEADERSHIP:

- “The Aftermath of the Paycheck Protection Program”, ASA webinar, 2021
- “The Home Stretch: Ensuring That You Maximize Your PPP Loan Forgiveness and Successfully Navigating the SBA Questionnaire”, Becker Legal PC, 2021
- “Payroll Tax Credit Deferral”, TechServe Connect Virtual Conference, 2020
- “The Taxman Giveth: Strategies That Minimize IT & Engineering Staffing Firm Tax Liability”, TechServe Connect, 2020
- “Maximizing PPP Loan Forgiveness”, Minority Business Development Agency Business Center, 2020
- “Paycheck Protection Program Update”, Illinois Search & Staffing Association, 2020
- “The Taxman Giveth: The Tax Benefits of the CARES Act”, TechServe Alliance, 2020
- “Paycheck Protection Program Loans Round 1 and 2 Update”, TechServe Alliance, 2020
- “Current and the Ever-Changing Rules of the Paycheck Protection Program and CARES Act – Where Are We Today”, Tricom, 2020
- “The Changing Rules of the Game: Audits, Forgiveness, and Taxability of Paycheck Protection Program Loans”, TechServe Alliance, 2020
- “Practice with Panelists: Coronavirus Aid, Relief, and Economic Securities (CARES) Act”, 2020

PRINCIPAL, UHY ADVISORS MI, INC.

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INDUSTRY EXPERTISE:

- High Net Worth Individuals
- Family Offices
- Manufacturing
- Staffing
- Land Development

ACTIVE & PRIOR PROFESSIONAL MEMBERSHIPS:

- Board Member – Michigan Women's Tax Association
- Professional Development Committee Member – WISE Michigan Chapter
- Member – Detroit Economic Club
- Member – American Institute of Certified Public Accountants
- MICPA – Michigan Association of Certified Public Accountants
- Member – Eastern Michigan University Alumni Association

ACTIVE & PRIOR CIVIC MEMBERSHIPS:

- Mentor – Winning Futures
- Volunteer – UHY Cares

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THOUGHT LEADERSHIP (CONTINUED):

- “Tax Cut Updates”, Boss Ladies Detroit Facebook, 2019
- “Expired Tax Provisions and General Tax Update”, UHY Advisors Tax Forum, 2014
- “Federal Tax Update”, MICPA West Oakland Small Practitioners