

# Nancy Morton, CPA

## CONSULTING & TAX MEMBER

Nancy has been in the practice of public accounting since 1986, having worked with the international accounting firms of Arthur Andersen and Deloitte & Touche prior to joining Dauby O'Connor & Zaleski, LLC in December of 2001. Nancy is a CPA and a Chartered Global Management Accountant.



### Education

- B.S., Butler University - Indianapolis, Indiana
- M.B.A., Indiana University - Indianapolis, Indiana
- M.S. Taxation, Villanova University - Villanova, Pennsylvania

### Professional Organizations

- Member, Indiana CPA Society
- Member, American Institute of Certified Public Accountants

### Joined DOZ in 2001

## Experience Highlights

Nancy has substantial experience with properties financed in part with LIHTC pursuant to IRC Section 42 and works with the tax department in regards to the annual preparation and/or review of hundreds of partnership and not-for-profit tax returns related to affordable housing communities, as well as funds that invest in those entities. Nancy is also involved with the 10% cost certifications required for carryover allocations, final cost certifications required for issuance of form(s) 8609, 95-5 calculations and analysis, and arbitrage rebate calculations required for tax-exempt bond financed transactions.

Nancy also serves on the technical review committee for a LIHTC syndicator to review structure and identify regulatory issues applicable to new transactions in which the fund intends to invest.

Nancy is a frequent speaker on LIHTC technical matters including Year 15 disposition scenarios, tax reform, and various tax credit topics. In addition, Nancy frequently leads internal and external training on partnership and not-for-profit compliance matters.

Nancy serves on DOZ's technical committee, responsible for researching in-depth tax matters, ensuring DOZ remains current on all legislative and regulatory issues, and communicates updates to clients in a timely fashion.