



SHARING OUR SUCCESS

Designations and Certifications

Certified Public Accountant

Areas of Special Emphasis

Client Accounting Services, Business Consulting and Compliance, Federal Tax, Tax Accounting, Hospitality, Nonprofits, Professional Services

Education

Bachelor of Arts in Accounting
University of West Florida, Pensacola, FL

LORI K. KELLEY, CPA

Member

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Lori Kelley has been with the firm since 1994 and is a Member in the firm's Tax Division. She concentrates on areas of income tax planning for businesses, individuals and tax-exempt organizations. She also advises regarding retirement and estate planning as well as business consulting. Lori resides in Fort Walton Beach, Florida with her husband.

Professional Affiliations

- Accounting & Financial Women's Alliance, Past National President (2017-18)
- Athena International Award Recipient, 2008
- Top 12 Business Women of 2009, Emerald Ladies Journal
- Florida Institute of Certified Public Accountants
- American Institute of Certified Public Accountants

Community Involvement

- Northwest Florida State College Board of Trustees, Past Chair
- Northwest Florida State College Foundation, Past President
- Niceville-Valparaiso Chamber of Commerce, Past Chair
- Walton County Chamber of Commerce, Past Chair
- Emerald Ladies Journal, Emerald Lady, June 2008
- 2001 Honorary Commander, 58th Fighter Squadron, Eglin Air Force Base
- 2024 Okaloosa County Women's Hall of Fame, Business Leader Inductee
- SmartBank, Advisory Board

Ask Me About

- Tax planning and navigating through the tax code for your business and individual needs
- My love of all things baseball—from statistics and scoring the game to my goal of seeing a game in every MLB park in the country
- My interest in craft beer breweries