



Roger Ortman, CPA EA

Instructor, Tax

With over 25 years of experience spanning taxation, training, and higher education, Roger Ortman is a seasoned tax practitioner who brings together a lifelong love of learning with the heart of a dedicated educator. His career began in both public and private accounting—including roles with General Motors and Electronic Data Systems—before launching his own tax consulting firm, Ortman and Associates. There, he provides strategic guidance to individuals and businesses, helping them navigate the everchanging landscape of taxation.

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Roger's passion for teaching and employee development led him to collaborate with Picture This, delivering soft skills and leadership training to organizations such as Eli Lilly, Roche, OneAmerica, Rolls Royce, Dow AgroSciences, and Marathon Petroleum, among other Fortune 500 companies.

His ability to make complex or mundane topics understandable and engaging provided him the opportunity to teach various continuing professional education (CPE) courses at top 100 accounting firms. Roger's CPE instruction covers a wide range of topics such as tax-efficient retirement planning including Social Security and Medicare strategies, estate planning with trusts, and timely tax law updates.

He also serves as an adjunct faculty professor in the Master of Science in Taxation program at the Kelley School of Business at Indiana University Indianapolis, where he shares his deep knowledge and practical expertise with the next generation of tax professionals.

Roger holds a Master of Science degree in Taxation and a Bachelor of Science degree in Accounting from Indiana University Purdue University Indianapolis. He is a Certified Public Accountant as well as a licensed Enrolled Agent. Roger is a member of the American Institute of Certified Public Accountants, Indiana CPA Society, National Association of Enrolled Agents, and Indiana Society of Enrolled Agents.