



# MICHAEL ANDERSON

Estate Tax Consultant

Dedicated Income Tax Consultant with a focus on estate and trust taxation. Expertise in navigating the complexities of estate planning and tax compliance for high-net-worth individuals and families. Proven ability to develop comprehensive tax strategies that align with clients' estate planning goals while minimizing tax liabilities. Demonstrates exceptional analytical skills and attention to detail, ensuring accuracy in tax filings and compliance with applicable regulations.

## CONTACT

- (555) 234-5678
- michael.anderson@email.com
- San Francisco, CA

## EDUCATION

### Master of Laws in Taxation

New York University  
2019

## SKILLS

- estate taxation
- trust compliance
- estate planning
- tax strategy
- client education
- regulatory knowledge

## LANGUAGES

- English
- Spanish
- French

## WORK EXPERIENCE

### Estate Tax Consultant

2020-2023

Wealth Preservation Advisors

- Provided expert guidance on estate and trust tax matters.
- Developed tailored estate plans to minimize tax liabilities.
- Conducted tax compliance reviews for estates and trusts.
- Collaborated with legal teams to ensure compliance with regulations.
- Educated clients on tax implications of estate planning decisions.
- Monitored changes in estate tax laws and regulations.

### Tax Associate

2019-2020

Legacy Tax Advisors

- Assisted in preparing estate tax returns and documentation.
- Maintained detailed records for compliance and audit purposes.
- Supported client meetings to discuss estate planning strategies.
- Conducted research on estate tax legislation and developments.
- Provided insights on tax-saving opportunities for clients.
- Collaborated with team members on various estate planning projects.

## ACHIEVEMENTS

- Successfully guided clients in minimizing estate tax liabilities by 30%.
- Recognized for excellence in client service with 'Client Champion' award.
- Presented at estate planning seminars on tax strategies.