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SKILLS

- Estate Planning
- Wealth Management
- Tax Strategy
- Trust Administration
- Financial Analysis
- Client Education

EDUCATION

JURIS DOCTOR, TAXATION LAW, NEW YORK UNIVERSITY SCHOOL OF LAW

LANGUAGE

- English
- Spanish
- German

ACHIEVEMENTS

- Successfully reduced estate tax liabilities for clients by an average of 30%.
- Recognized as a leading expert in estate tax strategy by Wealth Management Magazine.
- Developed a client referral program that increased new business by 25%.

Michael Anderson

WEALTH MANAGEMENT TAX ADVISOR

Results-driven Tax Advisor with a specialization in estate planning and wealth management. Extensive experience in advising high-net-worth individuals and families on tax-efficient strategies for wealth preservation and transfer. Exceptional ability to analyze complex financial situations and develop tailored tax plans that align with clients' long-term objectives. A strong advocate for client education, ensuring clients are well-informed about their tax obligations and opportunities.

EXPERIENCE

WEALTH MANAGEMENT TAX ADVISOR

Legacy Wealth Group

2016 - Present

- Developed comprehensive estate plans to minimize tax exposure for clients.
- Advised clients on tax implications of investment strategies and asset transfers.
- Assisted in the establishment and administration of trusts.
- Conducted financial analysis to identify tax-saving opportunities.
- Collaborated with attorneys and financial advisors to create integrated wealth plans.
- Educated clients on estate tax regulations and compliance requirements.

ESTATE TAX CONSULTANT

Premier Estate Advisors

2014 - 2016

- Provided tax consulting services to high-net-worth individuals and families.
- Conducted detailed reviews of estate plans and tax strategies.
- Advised on charitable giving and its tax implications.
- Prepared estate tax returns and ensured compliance with regulations.
- Engaged in client relationship management to enhance service delivery.
- Presented educational seminars on estate planning and tax strategies.