

MICHAEL ANDERSON

Estate Tax Analyst

- San Francisco, CA
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Detail-oriented Tax Analyst with a focus on estate and trust taxation. Extensive experience in navigating the complexities of estate tax regulations and compliance. Recognized for providing insightful tax planning recommendations to clients, enhancing their financial legacies. Proven ability to build strong client relationships through effective communication and personalized service. Committed to continuous education in tax law and estate planning strategies.

WORK EXPERIENCE

Estate Tax Analyst | Legacy Tax Advisors

Jan 2022 – Present

- Provided estate tax planning services to high-net-worth clients, ensuring compliance with estate tax laws.
- Conducted detailed analyses of estate documents to identify tax-saving opportunities.
- Collaborated with estate planning attorneys to develop comprehensive tax strategies.
- Educated clients on the implications of estate taxes on their financial planning.
- Utilized tax software to prepare estate tax returns accurately and efficiently.
- Maintained updated knowledge of changes in estate tax legislation and compliance requirements.

Tax Analyst - Trust Division | Wealth Management Services

Jul 2019 – Dec 2021

- Assisted in the preparation of trust tax returns, ensuring compliance with applicable regulations.
- Conducted research on trust taxation laws and their implications for clients.
- Supported senior tax analysts in developing trust tax strategies for clients.
- Maintained detailed records of trust tax filings and documentation.
- Participated in client meetings to discuss trust tax planning opportunities.
- Ensured timely compliance with trust tax filing deadlines to avoid penalties.

SKILLS

Estate tax compliance Trust taxation Financial planning Client education Tax document analysis
Regulatory knowledge

EDUCATION

Master of Laws in Estate Planning

2012

University of Miami

ACHIEVEMENTS

- Successfully reduced estate tax liabilities for clients by developing innovative planning strategies.
- Recognized for excellence in client service by receiving the 'Client Advocate' award.
- Improved team efficiency by implementing a new tracking system for trust tax filings.

LANGUAGES

English Spanish French