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## SKILLS

- Estate taxation
- Trust structuring
- Tax compliance
- Estate planning
- Client education
- Analytical skills

## EDUCATION

**MASTER OF LAWS IN TAXATION,  
HARVARD LAW SCHOOL, 2019**

## LANGUAGE

- English
- Spanish
- German

## ACHIEVEMENTS

- Successfully reduced estate tax liabilities for clients by an average of 25%.
- Recognized for outstanding service in estate tax preparation and planning.
- Developed a comprehensive guide on estate tax strategies for client distribution.

# Michael Anderson

## ESTATE AND TRUST TAX CONSULTANT

Dynamic Tax Associate with a focus on estate and trust taxation.

Demonstrates an exceptional ability to navigate the intricacies of estate planning and tax implications for high-net-worth individuals. Expertise in structuring trusts and estates to optimize tax outcomes and ensure compliance with applicable laws. Proven track record of conducting thorough tax analyses and providing strategic recommendations to clients.

## EXPERIENCE

### ESTATE AND TRUST TAX CONSULTANT

Wealth Management Services

2016 - Present

- Advised clients on estate planning strategies to minimize tax liabilities.
- Prepared and filed estate and trust tax returns with a focus on compliance.
- Collaborated with legal advisors to structure trusts for optimal tax outcomes.
- Conducted comprehensive tax analyses for high-net-worth individuals.
- Educated clients on the tax implications of estate planning decisions.
- Utilized estate planning software to enhance accuracy and efficiency.

### TAX ASSOCIATE

Premier Estate Planning

2014 - 2016

- Assisted in preparing estate tax returns and compliance documentation.
- Conducted reviews of client estate plans for tax optimization.
- Supported senior consultants in client meetings regarding estate tax strategies.
- Maintained current knowledge of estate tax law changes.
- Participated in workshops to enhance skills in estate and trust taxation.
- Developed educational materials for clients on estate tax implications.