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SKILLS

- Personal tax
- Tax planning
- Estate planning
- Client relations
- Financial analysis
- Compliance

EDUCATION

**BACHELOR OF SCIENCE IN FINANCE,
UNIVERSITY OF MICHIGAN**

LANGUAGE

- English
- Spanish
- German

ACHIEVEMENTS

- Achieved a 95% client retention rate through exceptional service.
- Identified tax savings strategies that resulted in over \$1 million in savings for clients.
- Recognized for excellence in client service by the Wealth Management Association.

Michael Anderson

PERSONAL TAX CONSULTANT

Results-driven Tax Consultant with significant experience in developing and executing tax strategies for high-net-worth individuals and private entities. Adept at providing personalized tax planning services that align with clients' financial goals while ensuring compliance with applicable tax laws. Proficient in analyzing complex financial situations to identify opportunities for tax savings and risk management.

EXPERIENCE

PERSONAL TAX CONSULTANT

Wealth Management Tax Advisors

2016 - Present

- Provided tax planning services for high-net-worth individuals.
- Developed personalized tax strategies to minimize liabilities.
- Conducted comprehensive reviews of clients' financial situations.
- Advised on estate and gift tax planning strategies.
- Prepared and filed individual tax returns for clients.
- Maintained strong client relationships, ensuring satisfaction and trust.

TAX ASSOCIATE

Private Wealth Services

2014 - 2016

- Assisted in preparing tax returns for high-net-worth clients.
- Conducted tax research to support planning strategies.
- Collaborated with financial advisors to align tax and investment strategies.
- Communicated tax implications of financial decisions to clients.
- Maintained accurate records of client interactions and tax filings.
- Supported senior consultants in client meetings and presentations.