MICHAEL
ANDERSON

Estate Tax Consultant

- San Francisco, CA
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Strategic Tax Dispute Resolution Specialist with a focus on estate and gift taxation, possessing a nuanced understanding of the intricacies involved in resolving disputes related to wealth transfer taxation. Extensive experience in representing clients in negotiations with tax authorities, ensuring compliance while effectively advocating for clients' interests. Expertise in developing strategies that minimize tax liabilities and maximize asset preservation.

WORK EXPERIENCE

Estate Tax Consultant | Wealth Management Group   Jan 2022 – Present

- Advised clients on estate planning and tax implications of wealth transfers.
- Negotiated with tax authorities to resolve estate tax disputes.
- Developed strategies to minimize estate tax liabilities for high-net-worth clients.
- Prepared documentation for tax filings and audits related to estates.
- Conducted workshops to educate clients on estate tax regulations.
- Collaborated with attorneys to ensure compliance with legal requirements.

Tax Advisor | Elite Tax Services   Jul 2019 – Dec 2021

- Provided consultation on gift tax implications for clients.
- Assisted in preparing and filing gift tax returns.
- Engaged with tax authorities to address gift tax disputes.
- Developed educational materials for clients on gift tax regulations.
- Maintained detailed records of client interactions and resolutions.
- Participated in seminars to promote understanding of estate and gift taxation.

SKILLS

Estate Taxation   Gift Taxation   Dispute Resolution   Client Education   Negotiation   Compliance

EDUCATION

Master of Laws in Taxation   2015 – 2019
New York University

ACHIEVEMENTS

- Successfully resolved numerous estate and gift tax disputes, saving clients millions.
- Recognized for excellence in estate planning by the National Association of Estate Planners.
- Authored a widely-used guide on estate tax strategies for tax professionals.

LANGUAGES

English   Spanish   French