



Phone: (555) 234-5678

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Website: www.michaelanderson.com

EXPERTISE SKILLS

- estate planning
- wealth management
- tax strategy
- client education
- regulatory compliance
- financial analysis

LANGUAGES

- English
- Spanish
- French

CERTIFICATION

- Juris Doctor, Stanford Law School

REFERENCES

John Smith

Senior Manager, Tech Corp
john.smith@email.com

Sarah Johnson

Director, Innovation Labs
sarah.j@email.com

Michael Brown

VP Engineering, Solutions Inc
mbrown@email.com

MICHAEL ANDERSON

ESTATE PLANNING TAX LAWYER

Strategic tax lawyer with a focus on estate planning and wealth management, dedicated to providing clients with comprehensive tax solutions tailored to their unique circumstances. Expertise encompasses the intricacies of estate and gift tax law, ensuring that clients' wealth is preserved for future generations. Highly adept at navigating the complexities of tax regulations while minimizing liabilities through proactive planning.

PROFESSIONAL EXPERIENCE

WealthGuard Legal Services

Mar 2018 - Present

Estate Planning Tax Lawyer

- Developed customized estate plans to minimize tax liabilities for clients.
- Advised clients on the tax implications of various estate planning strategies.
- Conducted thorough reviews of clients' financial situations to determine optimal tax solutions.
- Collaborated with financial planners to align tax strategies with overall wealth management goals.
- Represented clients in estate tax audits and disputes with the IRS.
- Educated clients on tax-efficient charitable giving strategies.

Legacy Planning Group

Dec 2015 - Jan 2018

Tax Advisor

- Assisted clients in preparing estate tax returns and related documentation.
- Researched and analyzed estate tax laws to provide informed advice.
- Facilitated discussions with clients regarding tax-efficient wealth transfer.
- Prepared legal documents necessary for estate planning.
- Participated in client meetings to discuss tax strategies.
- Maintained a comprehensive understanding of changing tax regulations.

ACHIEVEMENTS

- Helped clients save over \$5 million in estate taxes through effective planning.
- Published articles on estate tax strategies in leading legal journals.
- Recognized as a top estate planning lawyer by the National Association of Estate Planners.