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SKILLS

- estate planning
- wealth transfer
- compliance
- client relations
- tax strategy
- philanthropic planning

EDUCATION

MASTER OF LAWS IN TAXATION, NEW YORK UNIVERSITY, 2010

LANGUAGE

- English
- Spanish
- German

ACHIEVEMENTS

- Recognized as 'Top Estate Planning Advisor' by Wealth Management Journal in 2021.
- Increased client satisfaction scores by 35% through personalized service.
- Successfully managed multi-million dollar estate plans with zero tax penalties.

Michael Anderson

ESTATE PLANNING ADVISOR

Dynamic Wealth Tax Advisor with a specialization in estate and gift tax planning for high-net-worth individuals. More than 9 years of experience in delivering comprehensive wealth transfer strategies that minimize tax liabilities and maximize family legacies. Expertise in navigating complex estate laws and utilizing advanced planning techniques to achieve clients' philanthropic and financial goals.

EXPERIENCE

ESTATE PLANNING ADVISOR

Legacy Wealth Planning

2016 - Present

- Specialized in estate and gift tax strategies for high-net-worth clients.
- Developed customized estate plans that minimized tax exposure by 30%.
- Conducted family meetings to discuss wealth transfer strategies.
- Collaborated with attorneys to ensure compliance with estate laws.
- Provided insights on charitable giving strategies to enhance tax benefits.
- Monitored changes in estate tax regulations and advised clients accordingly.

TAX CONSULTANT

Premier Tax Solutions

2014 - 2016

- Advised clients on strategies to minimize estate and gift taxes.
- Implemented tax-efficient wealth transfer plans for families.
- Managed compliance for clients undergoing estate audits.
- Provided training for clients on estate planning best practices.
- Developed reports detailing tax implications of various estate strategies.
- Collaborated with financial planners to align estate plans with investment strategies.