



Karen Alexander

CPA, LEGAL SPECIALIST

Milwaukee

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About Karen

Tax and estate guidance with accounting background

Karen Alexander focuses on trusts and estates, tax and tax-exempt organizations. Also a certified public accountant, Karen's experience includes:

- **Administration of trusts, estates and foundations**, including preparation of accounts and tax returns.
- **Coordinating and reviewing preparation of fiduciary tax returns.**
- **Preparing tax and cash flow projections** for trusts, estates and individual beneficiaries.
- **Evaluating and maintaining tax software programs.**
- **Helping with partnerships and high wealth individual tax preparation**, including those with complex investment and tax reporting issues.

Prior to joining the firm, Karen was employed by two Big Four accounting firms, where she specialized in tax compliance services for trusts, high net worth individuals, partnerships and corporations.

Capabilities

Estate, Trust & Wealth Preservation

Professional & Civic Activities

- American Institute of Certified Public Accountants, member
- Wisconsin Institute of CPAs, member

Education and Honors

Bob Jones University (B.S., *magna cum laude*, 1985)

- Major: Accounting, Minor: Computer Science





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- Waukesha County Estate Planning Council, member
 - Estate and Trusts Specialty Section, steering committee

