SUSAN P. ROUNDS, JD, CPA, LLM, AEP

Susan is a Senior Vice President and Senior Director of Planning for Wells Fargo Business Advisory Services. Prior to joining Wells Fargo, Susan was a Senior Financial Planner in the Legacy Wachovia Financial Planning Group, chaired the Family Dynamics Committee and co-chaired the Business Owner Segmentation and Services Committee.

Her previous experience includes advising high net worth and business owner clients on business succession, wealth transfer and income tax issues in her private law practice, serving as Senior Vice President and Director of Knowledge Management and Research at the Family Office Exchange in Chicago, and working as a Vice President in both the Merrill Lynch Family Office and the Advanced Wealth Strategies Group in Princeton and Manhattan. Susan started her career practicing accounting with KPMG and PWC in Atlanta and Seattle.

Susan's articles on the subject of wealth transfer and wealth management have been published in *Trusts and Estates, The Journal of Practical Estate Planning*, the *NAEPC Journal of Estate and Tax Planning,* and the *Journal of Private Wealth Management.* She also makes frequent seminar presentations across the country, including at the NYU Institute on Taxation.

Susan has been named as an Accredited Estate Planner and sits on the NAEPC Board of Directors.

Susan earned her B.B.A. in Accounting, *cum laude*, from the University of Texas at El Paso, her J.D. from the University of Georgia School of Law and her LL.M. in Taxation from the Emory School of Law.

Susan taught *Estate and Gift Taxation* at the UGA School of Law and *Principles of Accounting, Managerial Accounting, and Federal Income Taxation* at the UGA Terry College of Business. She also taught *Tax and Reporting, Financial Accounting, Business Law*, and *Auditing* for the DeVry/Becker CPA Review Course and edits their online course on Estate and Gift Tax.