

Windes Welcomes Lori Moore as Tax Partner

LONG BEACH, CALIFORNIA, UNITED STATES, September 11, 2023

/EINPresswire.com/ -- [Windes](#), a premier California accounting and advisory firm, is pleased to announce [Lori Moore](#) as Partner in its Tax department. Lori has nearly 20 years of experience in public accounting, specializing in estate and trust tax planning, consulting, and compliance for high-net-worth individuals and families, and will be an integral part of the firm's robust Estate and Trust practice.



Lori Moore, CPA

"I am honored and excited for the opportunity to work with the exceptionally talented team at Windes," says Lori. "I'm looking forward to being a part of the journey of excellence and top-notch client service that Windes provides."

Lori has extensive expertise consulting on family mission, vision, and values for multi-generational families and establishing processes and procedures for family-owned companies' corporate accounting and finance divisions.

Drawing from her wealth of estate and legacy planning knowledge, Lori utilizes a vast array of tax and financial tools to help clients plan for the future. From inheritance planning and charitable gifting strategies to family income protection and wealth accumulation strategies, Lori ensures that clients' wishes are carried out, protecting their legacy and assets for future generations.

Lori holds a Bachelor of Science in Business Administration, with a concentration in Accounting, Financial Tracking, and Reporting, from the University of Michigan at Dearborn. She is a member of the American Institute of Certified Public Accountants, the California Society of Certified Public Accountants, and the Michigan Association of Certified Public Accountants.

"Lori's addition to our Estate and Trust practice will play a pivotal role in elevating our client services to new heights," says Managing Partner [James Cordova](#). "Her remarkable expertise in

legacy planning for high-net-worth families and their companies brings exceptional opportunities and dynamically integrates with so many of the firm's current and upcoming service offerings. We look forward to the positive impact she will have at Windes."

About Windes

Windes is a leading advisory, audit, and tax firm for growth-oriented small and mid-sized privately held companies, nonprofit organizations, and high-net-worth individuals. Our approach uses tailored expertise to proactively inform decision-making to maximize our clients' business potential. For more information on how we can be your trusted advisor, visit us at windes.com.

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