**SPEAKER’S BIO:**

**Natalie Roberts** is the owner and sole practitioner at Flagship Law, in Tampa, Florida, which she founded in January 2017. Natalie focuses her practice in the areas of tax law, business tax and estate planning. Natalie works closely with her clients to create fully integrated estate plans, reflecting client values and wishes. Her estate plans address client goals and objectives, any currently existing arrangements, real estate, insurance, bank accounts, retirement accounts and investment accounts. Considerations of asset protection and taxation are fundamental. To implement an estate plan, she drafts legal instruments, including wills, trusts, designations of health care surrogate, powers of attorney, living wills, and pet trusts. Her planning strategies may include use of LLCs, limited partnerships, individual trusts, marital trusts (QTIPs), credit shelter trusts, family (so-called "dynasty") trusts, intentionally defective grantor trusts, charitable lead and remainder trusts, insurance trusts, and grantor retained annuity trusts. Providing legal counsel to fiduciaries, including personal representatives and trustees, is another service Natalie offers. A special interest is business succession planning, helping clients determine the easiest and most efficient way to transfer ownership and control of a family business to younger generations.

Natalie obtained her J.D. and LL.M. in Taxation at the University of Florida. She previously practiced in the area of securities regulation, having worked at the Miami Office of the Securities and Exchange Commission. In 2015, Natalie decided to obtain her LL.M in Tax Law, in order to add estate planning/tax to her practice. She is a member of the Florida Bar Real Property, Probate and Trust Law Section, the Solo and Small Firm Section and the Tax Law Section. She is a member of the American Bar Association Business Law, Real Property, Trust and Estate Law and Tax Sections. Natalie is also a member of the Hillsborough County Bar Association’s Real Property, Probate and Trust Law, Securities Law and Tax Sections.

Natalie was selected for the Leadership Tampa Class of 2018, which has allowed her to connect with Tampa business leaders. Energized by the challenge of a new career and a new city, Natalie is committed to building relationships with the Tampa community and helping Tampa continue to grow as a business-friendly center.

Natalie is the proud mother of three outstanding and accomplished children who have each excelled in their academic pursuits. They are a product of her commitment to encouraging learning and intellectual curiosity. Natalie prioritizes being helpful and supportive to colleagues, friends, and family. She is an avid and discriminating reader, a fitness enthusiast, U.S.T.A tennis league team member, and a supporter of the arts throughout the region. On the philanthropic front, she is a supporter of hospice, environmental protection groups, and organizations that help victims of human trafficking, domestic abuse and substance abuse.

Natalie has published articles and given presentations in both tax and securities law, and is licensed in both Florida and Minnesota. Flagship Law with a clear sense of purpose and direction: helping you to prepare for the future and to protect the well-being of your loved ones. I am of taxation and protection of your assets from creditors and predators.

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