

## Neal Gosman

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[neal@epis.net](mailto:neal@epis.net)

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### SUMMARY OF QUALIFICATIONS

*Paralegal experienced with the following skills:*

- Complex estate planning and implementation for high net worth families,
  - Effective team interaction with financial planners and attorneys,
  - Excellent client communications skills (written, spoken, and graphic capabilities),
  - Estate settlement assistance,
  - Personal Income Tax preparation,
  - Ability to analyze situations, prioritize tasks, and solve problems,
  - Handles multiple tasks with independent initiative,
  - Mature judgment and works well with diverse individuals and communities.
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#### PROFESSIONAL EXPERIENCE

**Consulting Paralegal, Estate Planning Services,** Berger Financial Group, Inc.,  
Minneapolis, MN. 2016 to present

**Paralegal and President,** *epis.net* (Estate Planning Implementation Service  
Network), Saint Paul, MN. 2000 to present

**Manager of Estate Planning Services,** Wade Financial Group, Inc., Minneapolis, MN.  
1997 to 2016

**Legal Assistant,** Thomson & Nybeck, PA, Edina, MN 1999 - 2002

#### LEGAL EDUCATION

Minnesota Paralegal Institute, Minneapolis, MN (ABA Approved)  
Post-Baccalaureate Paralegal Certificate, 1997

#### CONTINUING PROFESSIONAL EDUCATION

Estate Planning and Probate for the Paralegal in Minnesota.  
Tax issues in Estate Planning and Probate in Minnesota.  
Minnesota Estate Administration.  
The Complete Trust Workshop (Minnesota).  
Charitable Estate Planning

#### PROFESSIONAL AFFILIATIONS

MSBA Associate, (Minnesota State Bar Assn) Probate Section NFPA (National  
Federation of Paralegal Associations)  
MPA (Minnesota Paralegal Association)

#### ACADEMIC

BA, University of Pennsylvania, Philadelphia, PA Certificate,  
Minnesota Paralegal Institute (ABA recognized)

#### COMPUTER SKILLS

Word processing - MS Word  
Spreadsheet development & analysis - MS Excel Database  
CRM – Junxure and JunxureCloud