

## Lori Moore, CPA

Partner, Tax



### Resident Office

2050 Main Street  
Suite 1300  
Irvine, CA 92614

### Telephone

949.676.2658

### Email

[lmoore@windes.com](mailto:lmoore@windes.com)

## Range of Experience

---

Lori has nearly 20 years of experience in public accounting and is a partner in the firm's Tax department. Specializing in estate and trust tax planning, consulting, and compliance for high-net-worth individuals and families, she works closely with clients to minimize their tax burden, protect their legacy, and grow their assets.

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's expertise assists clients with ensuring their wishes are carried out, protecting their legacy and assets for future generations.

## Education

---

Bachelor of Science, Business Administration, concentration in Accounting, Financial Tracking, and Reporting  
*University of Michigan, Dearborn*

## Community and Professional Affiliations

---

- American Institute of Certified Public Accountants, *Member*
- California Society of Certified Public Accountants, *Member*
- Michigan Association of Certified Public Accountants, *Member*