## Jamie Klosterman Sanders

Partner, Tax, Private Client Services
RSM US LLP
Houston, Texas
jamie.sanders@rsmus.com
+1 713 350 6135

## Summary of experience

Jamie's primary expertise includes income tax, estate tax and personal financial tax planning. She works extensively with high-net-worth families, trustees, business owners, executives and charitable organizations to structure and coordinate transactions around family wealth preservation, wealth transfers, charitable transfers, asset protection, and closely held enterprises' business matters, along with the tax compliance for multigenerational families and closely held businesses. She started her career with RSM in Chicago, Illinois, and moved to the Houston, Texas, office of RSM in 2012.

## Professional affiliations

- Texas Society of Certified Public Accountants
- Houston CPA Society
- Houston Business and Estate Planning Council
- Houston Estate and Financial Forum
- Houston Estate Planning Association Study Group
- American Women's Society of Certified Public Accountants
- American Institute of Certified Public Accountants
- RSM National Advisory Board for Private Client Services Team
- Leading the RSM committee around developing risk management practices related to the Federal Gift and Estate Tax Compliance and Consulting projects
- Active in developing and training RSM national, regional, and local training in areas of individual income taxation and estate, gift and trust taxation (2007 to the present)

## Education

- Master of Science, Taxation, *Cum Laude*, DePaul University, Chicago, IL
- Bachelors of Science, Accounting & Finance, *Summa Cum Laude*, DePaul University, Chicago, IL

## Awards

- Texas Society of Certified Public Accountants, "2015 Rising Star Honoree—20 under 40"
- Houston CPA Society, "2015 Young CPA of the Year"
- Houston CPA Society, "2014 Rookie of the Year"
- Illinois CPA Society, "2011 Distinguished Service Award"
- RSM, 2010 National Award Winner in "Excellence" category
- RSM, 2009 National Award Winner in "Most Success-Driven Individual" category
- DePaul University Dean's List and Division 1 Student Athlete

## Presentations and articles

- "OBBBA Tax Updates for Closely Held Businesses and their Owners." RSM US LLP external webcast. Presented with Andy Swanson and Amber Waldman. July 17, 2025.
- "Calm before the storm: Expiring Tax Cuts and Jobs Act Provisions." RSM US LLP external webcast. Presented with Rebecca Warren, Scott Filmore, and Kyle Brown. February 6, 2024.
- "Wealth Creation & Planning for CFO's." Panel Discussion with Cameron Sparough of Merrill Lynch, Jennifer Whalen of Bristow and Mauricio Morre of Enventure. CFO Leadership Council – Houston Chapter. February 16, 2023
- "Smart Sports Franchise Buyers Put Tax at the Center of the Deal." Bloomberg Tax Article. Co-authored with Amanda Hodgson and Justin Krieger. https://news.bloombergtax.com/tax-insights-and-commentary/smart-sports-franchise-buyers-put-tax-at-the-center-of-the-deal November 17, 2022.
- "Top Tax Issues Affecting High Net Worth Individuals." RSM US LLP Private Client Tax Forum. Presented with Matt Talcoff, Andy Swanson and Max Youngquist. August 16, 2022.
- "Preparing Gift Tax Returns: Collected Views and Perspectives." TexasBarCLE. 28th Annual Advanced Estate Planning Strategies Course. Co- Presented with Shyla Buckner of Sprouse Shrader Smith, Arielle Prengner of Davis & Willms, and Christine Wakeman of Winstead. April 21, 2022.
- "2021 Estate Planning Update." Family Office Exchange (FOX) Family Office Forum. Co-presented with Tom Abendroth of Schiff Hardin LLP. May 19, 2021.
- "Estate and Tax Planning Update: 10 Things That Are (or Should Be) on Your Family's Mind." Family Office Exchange (FOX) Family Office Forum. Co-presented with Mark Harder of Warner Norcross + Judd LLP. September 23, 2020.
- "Consider These Top Tax Options Before Starting a Business." Special Report Guest Contributor Article in the Houston Business Journal. Co-author with Barbara Strobel of RSM. July 5-11, 2019.
- "Business Succession Planning." Panel Discussion Seminar in Collaboration with BBVA Compass Bank for the Houston Indo-American Chamber of Commerce and the Greater Houston Retailers Association. January 29, 2019.
- Business Topic Spotlight: Succession Planning." Panel Discussion Article in the Advertising Supplement to the Houston Business Journal. June 22-28, 2018.
- "Proposed New Tax Legislation." Co-presented with Virginia Li and Karen Costa of RSM. RSM Presentation for groups of Clients and Advisors. Multiple dates in November and December of 2017.
- "Grantor Trusts - A Ticking Time Bomb." Co-presented with Audrey Young of RSM. RSM National Private Wealth Tax Conference. November 28, 2017.
- "2014-2015 Annual Tax Update." Co-presented with Kelly Bennett and Karen Costa of RSM US LLP. American Women's Society of Certified Public Accountants (AWSCPA). January 22, 2015.
- "Inherited IRAs—An Update on Creditor Protection Planning." Article on Houston CPA Society website, http://www.hcpasweekly.com/inherited-iras-an-update-on-creditor-protection-planning/July 24, 2014.
- "Trust Taxation Update—A Discussion on Final Regulations for IRC Section 67(e) Limitations of Deductions in Trusts." Presentation. Houston's Wednesday Tax Forum Group. May 27, 2014.
- "2013-2014 Gift and Estate Tax Update." Presentation. Houston Estate Planning Association. January 17, 2014.
- "2013-2014 Annual Tax Update." Co-presented with Kelly Bennett and Andrea Allred of RSM US LLP, AWSCPA, January 16, 2014.
- "Illinois Estate Tax Reinstated for 2011 and Beyond." Article on Illinois CPA Society website, http://www.icpas.org/hc-tax.aspx?id=3862, January 19, 2011. (Unavailable presently on website due to changes in time-sensitive material.)
- "Roth IRA Conversion Analysis in 2010." Co-presented with Alan Spigelman and Chuck Schultz of RSM. RSM National Private Wealth Tax Conference. November 18, 2010.
- "A Valuation Discount Win for Estate Planners." *The Tax Advisor* (April 2010): 230-231.
- "10 Simple, Recession-Friendly Estate Tax Planning Ideas." Co-authored and presented with Eunice Sullivan of S&P Tax Solution. Illinois CPA Society presentation at the 2009 All Tax Committee Meeting. June 30, 2009.
- "Illinois Pass-Through Entity Tax Payment Requirements for Non-Resident Owners and Beneficiaries." Article on Illinois CPA Society website, http://www.icpas.org/hc-tax.aspx?id=3884. February 4, 2009