



Andrew Brien, CTFA
Trust Officer
Advising in Tax and Estates

Andrew is a Trust Officer for SVA Plumb Trust Company, LLC. Andrew has more than a decade of experience in fiduciary, estate and gift taxation, as well as estate and trust administration.

Andrew has specialized experience in estate and gift tax regulations governing trust and estate accounting and tax compliance. He assists his clients in preparing estate, gift, individual income and fiduciary income tax returns.

In his role as a trust officer, he works with a broad range of clients helping to meet their financial needs regarding trusts.

In addition to his tax and paralegal background, Andrew is a Certified Trust and Financial Advisor (CTFA) and a 2008 graduate of the Cannon Financial Institute Trust Tax School.



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Areas of Expertise

- *Trust Administration*
- *Estate Administration*
- *Estate and Gift Taxation*

Education

University of Wisconsin
Bachelor of Arts