







Kelly Nelson, CPA

*Principal
Bader Martin, P.S.*

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PRINCIPAL, TAX PRACTICE
DIRECTOR OF HIGH NET WORTH SERVICES

CERTIFICATIONS

CERTIFIED PUBLIC ACCOUNTANT [CPA],
WASHINGTON

PRACTICE EMPHASIS

- MULTI-GENERATIONAL WEALTH PLANNING
- STRATEGIC TAX PLANNING
- ESTATE PLANNING
- BUSINESS AND FIDUCIARY TAX COMPLIANCE
- FAMILY OFFICE SERVICES
- FAMILY MEETING FACILITATION
- RETIREMENT PLANNING
- SUCCESSION PLANNING
- FAMILY AND CLOSELY HELD BUSINESS CONSULTING
- TECHNOLOGY VENTURES AND THEIR EXECUTIVES AND INVESTORS, WITH AN EMPHASIS IN SOFTWARE AND SAAS

EDUCATION

BA IN BUSINESS ADMINISTRATION/
ACCOUNTING, CUM LAUDE, UNIVERSITY
OF WASHINGTON

Kelly Nelson is a principal in Bader Martin’s tax practice. She also directs the firm’s high net worth practice group.

Kelly works collaboratively with clients and their advisors on multi-generational wealth planning. She provides them with a range of services, including strategic tax and estate planning, retirement planning, family office, family meeting facilitation, business and fiduciary tax compliance, succession planning and business consulting to name a few.

She demonstrates a rare ability to develop and maintain an overall plan for the family while preserving harmony among family members and across the generations.

Kelly is also a leader in the firm’s technology practice group. She is a trusted advisor for software, SaaS and other technology companies, as well as technology executives and angel investors.

YEARS OF EXPERIENCE 24

AFFILIATIONS

- American Institute of Certified Public Accountants
- Washington Society of Certified Public Accountants
- Kitsap Estate Planning Council
- Harrison Medical Center, Board Chair
- Past Vice Chair, Harrison Medical Center Foundation

Bader Martin, P.S. Certified Public Accountants + Business Advisors

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