



Natalie A. Roberts

Natalie's career began as an Enforcement Attorney with the SEC, investigating and litigating violations of the federal securities laws. After working in securities compliance for years, Natalie decided to expand her areas of practice. In 2015-16, she returned to the University of Florida Law School to obtain her Master of Laws in Taxation. Since then, Natalie has practiced exclusively in the areas of tax law and estate planning. Beginning in January 2017, Natalie founded a solo practice in South Tampa, Flagship Law, which allowed her to make meaningful connections throughout the Tampa Bay community. Natalie enjoys helping her clients take care of their loved ones through careful planning. She counsels her clients concerning incapacity planning, estate planning, asset preservation, tax minimization and business succession planning.

If you are required to probate an estate, check out Natalie's online training course "Decedent's Final File: Actions Steps After a Client Passes Away".

Natalie grew up in Palm Harbor, Florida, but lived most of her adult life in Miami, FL, Litchfield, CT and Edina, MN. She returned to Tampa Bay in 2014 after 18 winters in Minnesota.

Natalie is extremely active. Her activities include fundraising and support for numerous charitable organizations and presentations to various groups.

She is a member of the following organizations:

- Leadership Tampa Class of 2018
- Leadership Tampa Alumni, Women of Influence and Programming Committees
- Tampa Chamber of Commerce
- South Tampa Chamber of Commerce
- Estate Planning Council of Tampa Bay
- Economic Club of Tampa
- Florida Bar, Hillsborough County Bar Association, American Bar Association, and Minnesota State Bar Association: Tax, Probate, Trust and Estate Planning, and Solo/Small Firm sections
- Women in Leadership and Philanthropy, Programming Committee
- League of Exceptional Women, Helen Gordon Davis Centre for Women
- League tennis teams at Davis Islands and Harbour Island Athletic Club

Natalie has three adult children who live in Washington D.C., Atlanta, GA and Minneapolis, MN. She enjoys reading, traveling, tennis, and working out in the gym.

EDUCATION

- J.D. with Honors and LL.M. in Taxation, University of Florida
- B.A., Emory University



OF COUNSEL

P: (813) 225-2500

F: (813) 223-7118

E: natalier@jpfirm.com

401 East Jackson Street
Tampa, FL, 33602
United States of America