



SHIRLEY NELSON, J.D.

Associate Advisor

ABOUT

Growing up, Shirley was always interested in math and science. At age 16, Shirley participated in the Xiwang Cup-Chinese National Mathematical Olympiad and achieved providential gold medal for her age group. Shirley then pursued her interest in science and technology in college where she majored in Industrial and Systems engineering, tackling logistic and supply chain issues.

After working in various industries in Singapore and China, Shirley moved to the United States and completed a Juris Doctor degree focusing on Intellectual Property Laws. Shirley then practiced as a patent attorney at Pearne & Gordon—a boutique law firm in Cleveland, Ohio for many years before relocating to Corning, N.Y.

Shirley's experience in various industries makes her a multifaceted professional. You will find her conducting market research one hour and interpreting tax statutes the next. Shirley enjoys counseling clients on investment issues, particularly those related to technology and intellectual property. She looks forward to sharing her knowledge on tax planning matters with expats, new immigrants and Americans retiring abroad.

Shirley is bilingual. She speaks, reads, and writes English and Mandarin Chinese. Her natural ability to solve financial problems makes her a great asset to the firm.


CONCENTRATIONS

Investment Planning
Intellectual Property Related Matters
Tax and Estate Planning
Insurance Analysis


Currently pursuing Certified Financial Planner® Designation and Chartered Financial Analyst® Designation

CONTACT

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EDUCATION

Case Western Reserve
University; JD 2014

National University of
Singapore; Industrial &
Systems Engineering, with
honors, 2008

Licensed Patent attorney
with USPTO

Licensed attorney pending
registration in NY, and
registered as inactive in
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