Shelby Anderson, J.D., CEPA®

Senior Wealth Planner

Shelby Anderson is a Senior Wealth Planner at Clark Capital Management Group. In this role, Shelby works closely with clients' legal and tax advisors to provide client-facing expertise across a wide range of wealth planning strategies. She specializes in estate and tax planning strategies, charitable planning, executive and equity compensation planning, business succession planning, pre- and post-transactional planning, concentrated position management, and other personal planning strategies.

Prior to joining Clark Capital Management Group, Shelby was an Executive Director on J.P. Morgan Wealth Management's Wealth Planning and Advice Team, where she oversaw the delivery of a holistic wealth management experience to advisors and their clients. Shelby joined J.P. Morgan in 2019 as a Vice President and Assistant General Counsel before transitioning to the Wealth Planning and Advice Team. Prior to joining J.P. Morgan, Shelby was an attorney for Ice Miller LLP, where she advised individuals on sophisticated estate planning, succession planning, charitable planning, and wealth transfer planning strategies.

Shelby received her B.S. in Finance from The Ohio State University and her J.D. from Indiana University. She is a member of the State Bar of Illinois, Indiana, and Ohio.