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Education:
- University of Notre Dame, BBA (Accounting)

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- American Institute of CPAs
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Jim Raaf specializes in comprehensive tax and financial planning for high net worth families and entrepreneurial businesses. He has over 33 years of experience working with clients on succession planning, estate and gift tax structuring, and income tax planning for both operating entities and their owners.

Before joining Andersen Tax, Jim was a Tax Partner at Arthur Andersen and Deloitte, and led a comprehensive wealth management team within BMO Harris Bank.

Jim's practice focuses on:

- Succession planning for closely-held businesses
- Estate and gift tax planning
- Individual income tax planning
- Taxation of S corporations and partnerships
- Broad-based financial planning

Jim is a co-author of a book addressing entrepreneurs' concerns surrounding succession planning and has been a contributor to a number of publications with articles relating to planning concerns for closely-held businesses and their owners.