

## Daisha L. Hayes

Wealth Planning Analyst

Macon

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### About Daisha

**As a certified public accountant (CPA), Daisha Hayes brings years of tax, financial and legal experience to her role as an advisor to clients involved in estate and wealth transition issues. With a deep knowledge base in this complex and specialized area, Daisha guides individuals, families and businesses and consults with James Bates attorneys on a wide range of matters, including estate tax, asset protection, estate administration, compliance reporting, corporate and partnership structures and Internal Revenue Service examinations and negotiations.**

Many of the firm's clients engage in gifting and have reportable transactions that must be disclosed to the IRS. Daisha prepares gift tax and estate tax returns and reviews those prepared by outside CPAs to ensure everyone is aligned and that the reporting process follows the goals and outline of the planning process.

Daisha enjoys being involved in estate planning from the initial meeting with attorneys and clients to drafting and revising documents to implementing the plan and helping clients get comfortable with how it will meet their goals and needs over the long term. In addition, she serves as a lead contact to help clients grappling with accounting and wealth

### Services

- Tax + Wealth Planning

transfer concerns, such as generation-skipping transfers, family business transactions, legacy issues, estate tax implications and placing parameters on inheritances to keep the best interests of the beneficiary at the forefront.

Clients value Daisha's quick responsiveness, thoroughness and clear communication, which includes her ability to distill complicated concepts into simple terms. Those she assists also appreciate her discretion and ability to nimbly navigate family dynamics amidst fraught estate and wealth-transfer matters.

Prior to joining the firm, Daisha gained more than seven years of professional, client-focused experience in both the legal and accounting environments. She earned an MBA with a concentration in accounting before earning her CPA license.

## **After Hours**

Daisha and her husband have three children, so almost everything she does outside of work is family oriented. In addition, she runs and has an interest in tennis.

## **Professional Organizations/Activities**

- Georgia Society of Certified Public Accountants
- American Institute of Certified Public Accountants

## **Education**

Georgia College and State University (M.B.A., 2012)

Mercer University (B.A., 2008)