

# Trusts, Estates & Succession Planning

Our trusts and estate planning group works with clients and clients' advisory team members to identify personal goals. We then customize an estate plan to achieve these objectives. Our broad and sophisticated trusts and estate planning practice addresses tax and estate planning opportunities for individuals and businesses of all sizes.

## Estate Planning

Many individuals perceive estate planning to be a daunting process. Our attorneys explain estate planning options in detail, making sure clients are well informed and understand the documents used to implement their goals. Our experience enables our clients to reduce or eliminate estate, gift, and generation-skipping transfer taxes, to avoid or minimize the probate process, and to provide tools to adapt to unforeseeable circumstances.

In addition to creating estate plans, we strive to develop strong relationships with our clients. At our clients' request, we periodically review their estate plans and make certain the plan evolves with changing financial and personal circumstances, as well as changes in the law.

## Estate Administration

We realize that even a well-drafted plan may lead to estate disputes. We work closely with estate and trust fiduciaries to ensure their obligations are met. In the event an estate dispute cannot be peacefully resolved, our attorneys guide fiduciaries and beneficiaries through litigation to enforce their rights and recover what they are entitled to.

## Wealth Management

Our trusts and estate planning practice utilizes legal and tax techniques to achieve the financial objectives of our clients. Our team of attorneys work in concert with our clients' other advisers to develop a plan that encompasses our clients' goals, relationships, commitments, and resources.

## Business Planning

We have substantial experience in the area of business planning for owners of closely held businesses, including extensive experience in transfer and partnership issues. We assist clients in the integration of business planning techniques and estate planning by providing advice on the tax and non-tax

### PROFESSIONALS

Jacqueline L. Messler  
Partner

Steven L. Baerson  
Of Counsel

Timothy A. Cisler  
Senior Counsel

Anne K. Connolly  
Paralegal

Sharon L. DeVault  
Of Counsel

Kevin L. Eismann  
Partner

Lynn M. Gompper  
Senior Paralegal & E-  
Discovery Specialist

Lawrence J. Gregory  
Of Counsel

Gini L. Hendrickson  
Senior Counsel

Cheryl A. Herrick  
Paralegal

Natalie D. Hood  
Associate

Susan Hornes  
Paralegal

Mark G. Kmiecik  
Partner

Howard M. Lang  
Of Counsel

Andrew C. MacDonald  
Senior Counsel

Charles G. Maris  
Partner

Claire A. McDonough  
Associate

issues related to the transfer of family businesses, including capital structure reorganizations, buy-sell arrangements, gift programs, and valuation issues.

### Areas of Focus

Our attorneys understand that creating and maintaining estate planning documents is an important step in the process in order to ensure our clients' wishes are properly carried out, that their assets are properly handled, and that their business and other interests are properly managed. To assist clients in this process, the attorneys in our estate planning practice regularly draft and administer complex estate plans for families and businesses, including:

- Wills and Related Transfer Documents
- Living Trusts
- Life Insurance Trusts
- Private Foundations
- Charitable Trusts
- Gift Trusts
- Dynasty Trusts
- Family Limited Partnerships
- Intentionally Defective Trusts
- Marital Property Agreement
- Power of Attorney

In addition to preparing and administering these documents, we routinely consult with clients on strategic business planning among generations and provide counsel on:

- Asset Protection Planning
- Business Continuity and Succession Planning
- Planning with Executive Compensation Benefits and Qualified Plans
- Charitable Planning and Philanthropic Giving
- Tax Minimization Strategies
- Selection of Trustees
- Non-Traditional Family Planning

### Experience

Successfully Received the Requisite Authority From the Court for a Hospitality Business to Continue Operation Out of an Estate During a Probate Administration

## Trusts, Estates & Succession Planning

Jane H. Park  
Of Counsel

Ann M. Rieger  
Partner

Ruth E. Robinson  
Partner

Allen M. Salomon  
Partner

Michael V. Shaw  
Associate

Thomas A. Strandberg  
Partner

Peggy A. Thompson  
Paralegal

H. Randolph Williams  
Of Counsel

Danielle M. Zimmerman  
Paralegal

### AREAS OF CONCENTRATION

Fiduciary, Trust & Probate  
Litigation

## Trusts, Estates & Succession Planning

Advised a Blended Family on Creating Their Estate Plan

Successfully Transferred a Liquor License for a Wisconsin Establishment to the Executor of the Owner's Estate

Represented a Closely Held Family Business Design, Implement and Update their Business Succession Plan

Established a Custodial Trust for a Minor Beneficiary of a Significant Personal Injury Settlement

Engaged by a Decedent's Survivors to Get Control of an Estate

Represents a Privately Held Construction and Leasing Company in Daily Corporate Legal Needs

Guided a Business Owner in Selling his Company Interest to Irrevocable Trusts

### Firm News

Amundsen Davis Welcomes Natalie D. Hood to Brookfield Office  
Firm News, December 23, 2024

Congratulations to Amundsen Davis Attorneys Included on the 2024 Wisconsin Super Lawyers and Rising Stars Lists  
Firm News, November 14, 2024

Several Amundsen Davis Service Groups Named in the 2025 Edition of Best Law Firms®  
Firm News, November 7, 2024

100 Amundsen Davis Attorneys Recognized by Best Lawyers® in 2025 in America  
Firm News, August 15, 2024

Amundsen Davis Attorneys Included in 2023 Wisconsin Super Lawyers and Rising Stars Lists!  
Firm News, November 16, 2023

Amundsen Davis Named in the 2024 Edition of Best Law Firms®  
Firm News, November 2, 2023

82 Amundsen Davis Attorneys Recognized by Best Lawyers® in 2024 in America  
Firm News, August 17, 2023

Thomas Strandberg Joins Amundsen Davis's Brookfield Office  
Firm News, April 24, 2023

Michael Shaw Joins Amundsen Davis's Appleton Office  
Firm News, April 10, 2023

Amundsen Davis Attorneys Included in the 2022 Wisconsin Super Lawyers and Rising Stars List  
Firm News, *Amundsen Davis*, November 15, 2022

U.S. News & World Report – Best Lawyers® “Best Law Firms” 2023  
Firm News, November 3, 2022

29 Amundsen Davis Attorneys Recognized by *Best Lawyers in America*© 2022  
Firm News, August 19, 2021

Amundsen Davis Ranks on Crain's Chicago Business' 2018 Largest Law Firms List  
*Crain's Chicago Business*, October 25, 2018

Amundsen Davis Ranks on Crain's Chicago Business' Largest Law Firms List  
*Crain's Chicago Business*, September 15, 2017

Amundsen Davis Ranks on Crain's Chicago Business' Chicago Largest Law Firms List  
Firm News, *Crain's Chicago Business*, September 10, 2016

### In the Media

Jacqueline Messler Discusses Updates to Transfer-on-Death Documents  
Media Mention, *InsideTrack*, February 15, 2023

### Alerts

Common Misconceptions in Estate Planning: Wills Avoid Probate  
Article, *Amundsen Davis Trusts, Estates & Succession Planning Alert*, June 17, 2025

Preserving Harmony at the Family Cottage with an LLC  
Article, *Amundsen Davis Trusts, Estates & Succession Planning Alert*, July 30, 2024

Planning for the Future: Managing Your Healthcare with Advance Directives  
Article, *Amundsen Davis Trusts, Estates & Succession Planning Alert*, July 22, 2024

Estate Planning for Young Adults: Essential Documents as Your Child Heads to College  
Article, *Amundsen Davis Trusts, Estates & Succession Planning Alert*, May 20, 2024

Navigating the Future: Essential Steps for Estate Planning After the Loss of a Loved One  
Article, *Amundsen Davis Trusts, Estates & Succession Planning Alert*, April 18, 2024

New Gift and Estate Tax Exemption Limits for 2024  
Article, *Amundsen Davis Trusts, Estates & Succession Planning Alert*, December 19, 2023

## Trusts, Estates & Succession Planning

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Is it Time to Update Your Estate Plan?

Article, *Amundsen Davis Trusts, Estates & Succession Planning Alert*, June 6, 2023

Planning for College? Why Your 18-Year Old Needs a Durable Power of Attorney

Article, *Amundsen Davis Trusts, Estates & Succession Planning Alert*, May 8, 2023

The IRS Extends Time to Make Portability Election

Article, *Amundsen Davis Trusts, Estates & Succession Planning Alert*, August 18, 2022

In the Crosshairs: Guns in Estate Planning

Article, May 9, 2022

When Congress Says, "Never Mind", Does It Mean It? The latest news regarding changes to the Gift and Estate Tax Laws.

Article, October 29, 2021

How Might Joe Biden's Tax Proposals Affect You?

Article, May 14, 2021

Act Now – Estate Tax Planning Under the Biden Administration

Article, January 25, 2021

Individual Tax Planning Following the November 2020 Elections

Article, November 30, 2020

IRS Clarifies Stimulus Checks Sent to Deceased Taxpayers Must Be Returned

Article, May 8, 2020

6 Estate Planning Steps to Take in Your Free Time

*Amundsen Davis Estate Planning Alert*, April 14, 2020

CARES Act: Historic Senate Legislation to Provide Individuals with Personal Tax Rebates Among Other Tax Advantages (Updated March 27, 2020)

Article, March 26, 2020

Due Date for Payment of Certain Taxes Due April 15, 2020 Postponed to July 15, 2020 Pursuant to IRS Notice 2020-17

Article, March 18, 2020

An Essential Conversation: Your Burial Rights and Wishes

*Amundsen Davis Estate Planning Alert*, March 10, 2020

The Validity of Handwritten Wills

*Amundsen Davis Estate Planning Alert*, January 21, 2020

7 Factors to Consider When Choosing a Guardian for Minors

*Amundsen Davis Estate Planning Alert*, January 7, 2020

Stage Is Set for Significant Retirement Bill to Pass by Year End (SECURE Act)

Article, December 18, 2019

## Trusts, Estates & Succession Planning

Top Considerations When Choosing Your Trustee

*Amundsen Davis Estate Planning Alert*, December 3, 2019

Pet Guardians: 5 Steps to Help Care for Man's Best Friend During the Unexpected

*Amundsen Davis Estate Planning Alert*, June 25, 2019

What Happens if You Die Without a Will?

*Amundsen Davis Estate Planning Alert*, May 21, 2019

Advance Directives: Planning Your Medical Care and Treatment

*Amundsen Davis Estate Planning Alert*, April 18, 2019

Estate Planning Lessons We Can Learn from Luke Perry

*Amundsen Davis Estate Planning Alert*, March 14, 2019

What to do When a Loved One Dies: A Checklist for Survivors

*Amundsen Davis Estate Planning Alert*, February 27, 2019

Estate Planning For Your Pets

Article, February 18, 2019

5 Estate Planning Tasks to do in the New Year

*Amundsen Davis Estate Planning Alert*, January 8, 2019

3 Mistakes to Avoid in a Revocable Living Trust

*Amundsen Davis Estate Planning Alert*, December 3, 2018

Seven Estate Planning Considerations for Blended Families

*Amundsen Davis Estate Planning Alert*, November 13, 2018

Guardianship for Special Needs Children

*Amundsen Davis Estate Planning Alert*, October 9, 2018

'Til Death do Us Part: Marriage and Estate Planning

*Amundsen Davis Estate Planning Alert*, September 18, 2018

Navigating Special Needs Trusts for Children with Disabilities

*Amundsen Davis Estate Planning Alert*, August 23, 2018

How Often Should I Review My Estate Plan?

*Amundsen Davis Estate Planning Alert*, August 8, 2018

What to Consider Before Hiring an Estate Planning Attorney

*Amundsen Davis Estate Planning Alert*, July 27, 2018

Are Your Kids Heading off to College? Consider Setting Up A Power of Attorney

*Amundsen Davis Estate & Business Planning Alert*, July 10, 2018

Having a Baby Changes Everything: Guardianship Considerations for Parents  
Creating Wills

*Amundsen Davis Estate & Business Planning Alert*, June 27, 2018

## Trusts, Estates & Succession Planning

Why Do I Need an Estate Plan?

*Amundsen Davis Estate & Business Planning Alert*, June 12, 2018

Business Succession Opportunities after Tax Reform

*Amundsen Davis Corporate Alert*, March 2, 2018

IRS Announces 2018 Estate and Gift Tax Limits

Article, November 6, 2017

Tax Reform Update

Article, November 3, 2017

Estate Planning for Your Digital Property

Article, June 2, 2017

Tax Reform In the Making: A Comparison of the Potential Revisions

Article, March 2, 2017

Attention to How Your Farm Business is Organized Pays Off for the Heirs at Tax Time

Article, *Amundsen Davis Agribusiness Alert*, March 7, 2016

### Events

Let's Talk: Wills, Trusts, & Estate Planning

Speaking Engagement, Cornerstone Financial Group LLC, Seminar; Appleton, WI, February 12, 2025

Spots on the X-Ray: Identifying Ways to Add Value to Clients

Speaking Engagement, Milwaukee, WI, May 15, 2024

Protect Your Estate

Speaking Engagement, Appleton, WI, January 15, 2024

In the Crosshairs: Guns in Estate Planning

Speaking Engagement, Appleton, WI, January 12, 2023

Proposed Wealth Tax Changes Under the Biden Administration

Speaking Engagement, BizTimes, Family & Closely Held Business Summit; Brookfield, WI, June 29, 2021

An Attorney, a CPA and an Insurance Agent walk into an Investor Meeting...

Speaking Engagement, Appleton REIA, Seminar; Appleton, WI, June 8, 2021

Key Components of an Effective Buy-Sell-Agreement

Speaking Engagement, Exit Planning Institute, Webcast, May 27, 2021

Planned Giving: Explore the Benefits to Society

The Society of St. Vincent de Paul, Zoom, November 10, 2020

## Trusts, Estates & Succession Planning

Next Generation Manufacturing Summit 2019

Speaking Engagement, Wisconsin Exposition Center; West Allis, WI, October 9, 2019

Preserving the Family Legacy Through Estate Planning

Speaking Engagement, Italian Community Center; Milwaukee, WI, June 13, 2019

Estate Planning Basics

Amundsen Davis, Webcast, May 8, 2019

Advanced Estate Planning: Craft More Effective and Sophisticated Plans for Your Clients

National Business Institute, March 5, 2019

Gifting Techniques Using Trusts and The Use of Family Limited Partnerships/LLCs in Estate Planning

Speaking Engagement, Radisson Milwaukee West Hotel; Milwaukee, WI, February 28, 2019

Estate Planning for Your Animal-Loving Clients

Speaking Engagement, Association for Women Lawyers, January 16, 2019

Succession Planning: Continuing Your Legacy

Speaking Engagement, Association of General Contractors (AGC) of Greater Milwaukee; Milwaukee, WI, November 15, 2018

Family & Closely Held Business Summit 2018

Event, BizTimes Media; Milwaukee, WI, June 14, 2018

Step-by-Step Estate Planning II

Event, State Bar of Wisconsin Seminar Series; Milwaukee, WI, February 23, 2018

What Does Tax Reform Mean for You and Your Business?

Event, Northern Trust Economic Trends 2018; Milwaukee, WI, January 19, 2018

Next Generation Manufacturing Summit 2017

Speaking Engagement, Wisconsin Exposition Center at State Fair Park; West Allis, WI, October 4, 2017

Family & Closely Held Business Summit 2017

Speaking Engagement, Potawatomi Hotel & Casino; Milwaukee, WI, July 12, 2017

Gifting Techniques Using Trusts and The Use of Family Limited Partnerships/LLCs in Estate Planning

Speaking Engagement, State Bar Center; Madison, WI, February 23, 2017



## Published Works

State of Illinois Force Majeure Law Compendium (during COVID-19 pandemic)  
*USLAW*, June 5, 2020

Stalled SECURE Act Finally Enacted Into Law  
Publication, *Illinois Bar Association Newsletter*, January 2020

The SECURE Act Poised to Eliminate Common Estate Planning Technique  
Publication, *ISBA Estate Planning Newsletter*, July 30, 2019

## Blog Posts

What the Show *Succession* Teaches Us About Planning for a Family Business  
*Corporate News: A Legal Update*, September 7, 2023

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