Ann M. Rieger

Brookfield, WI

262.792.2427 | arieger@amundsendavislaw.com

PARTNER

Overview

With more 30 years of experience in estate planning and business law, Ann is well aware that she is handling someone's "baby", whether that be a blood relative or an enterprise they have nursed from infancy.

While Ann's clients are typically business owners, senior executives and professionals who appreciate her thoughtful and creative approach to their often complicated personal, tax and financial planning challenges, she works with clients in varying personal and financial situations. She has extensive experience in the preparation and implementation of various estate and succession planning techniques, including wills, revocable trusts, irrevocable life insurance, generation skipping transfer trusts, charitable trusts, family limited partnerships, marital property agreements and powers of attorney. These techniques are often used in combination to help clients achieve their goals of reducing administrative burdens, minimizing taxes, implementing structures to address unique family dynamics, incapacity planning, charitable giving, creditor protection and other benefits.

Ann uses her accounting background to assist closely-held business clients in tax planning, liability protection, ownership and management succession, and other matters. This includes organizational documents, buy-sell and transfer restriction agreements, negotiation and preparation of various other corporate agreements and counsel for ongoing business operations.

In assisting tax exempt organizations, Ann counsels clients across the full life cycle of an organization. These critical milestones include incorporation, obtaining recognition of tax exempt status from the IRS, the structuring of internal policies and procedures to preserve tax exempt status, consultation regarding government regulation, corporate restructuring, mergers and acquisitions, financing and compliance with open records and exemption materials at the local, state and federal levels.

SERVICES

Corporate & Securities

Nonprofit Institutions & Tax-Exempt Organizations

Trusts, Estates & Succession Planning

EDUCATION

Marquette University Law School, J.D., *cum laude*

Marquette University, B.S., with honors

ADMISSIONS

Wisconsin

Experience

Facilitated the Merger of Two Long-Term Successful Social Service Agencies

Assisted with the Conversion of a Nonprofit Entity

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

Membership & Involvement

- Amundsen Davis Executive Committee
- Member: Milwaukee Estate Planning Forum (2000 – present); TEMPO Waukesha (2015 – present); Waukesha County Estate Planning Council (2002-present); Mid-Winter Estate Planning Clinic
- Advisory Board Member: Marquette University Law School (2012 – present)
- Director: St. Dominic Parish Endowment Fund (2001 – present)
- Herbert Mueller Society Member: Greater Milwaukee Foundation (2009 – present)
- Former Chair: Catholic Community Foundation

Honors

- Selected to The Best Lawyers in America® in Corporate Law: 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024, 2025, 2026
- Selected to The Best Lawyers in America® in Nonprofit/Charities Law: 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024, 2025, 2026
- Selected to The Best Lawyers in America® in Trusts and Estates: 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024, 2025, 2026
- Selected to Best Lawyers® in Nonprofit/Charities Law "Lawyer of the Year" in Milwaukee: 2014, 2017, 2019, 2021, 2023, 2025
- Selected to The Best Lawyers in America© Women in Law: 2017
- Listed as Five Star Financial Services Professional: 2015

Firm News

130 Amundsen Davis Attorneys Recognized by Best Lawyers® in 2026 in America
Firm News, August 21, 2025

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

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

Alerts

IRS Provides Tax Inflation Adjustments for Tax Year 2022

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

How Might Joe Biden's Tax Proposals Affect You?

Family Business Succession Planning in the Era of Tax Uncertainty: Use Available Tax Advantages or *Perhaps* Lose Them

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

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

IRS Announces 2018 Estate and Gift Tax Limits

Tax Reform Update

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

Speaking Engagements

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

Step-by-Step Estate Planning II
Event, State Bar of Wisconsin Seminar Series; Milwaukee, WI, February 23, 2018

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