

TREVOR LIPPMAN LEADS EFFORT TO SECURE \$5.4 MILLION SETTLEMENT IN WILL FRAUD CASE



Attorney [Trevor C. Lippman](#), a member of the firm's Inheritance Litigation Team, recently resolved a two-year dispute representing the siblings of a deceased physician involving allegations that the opposing party conspired with an attorney and two witnesses to create a fraudulent will after the death of their brother.

In what can only be described as a tragic, yet fascinating case, the partner of a deceased physician had his purported estate planning attorney (no longer licensed) produce a copy of a will to the decedent's siblings approximately one week following their brother's death. Under the older will, the siblings received the entire multimillion-dollar estate. Under the new will, the siblings would receive \$100,000.

Attorney Lippman fought to allow for a full investigation surrounding the purported new will over the objections of the decedent's partner, who sought, with the purported drafting attorney and two witnesses, to rush this matter to resolution.

What began as an investigation into possible allegations of undue influence and lack of capacity quickly turned into an investigation into the authenticity of the new will and the attorney, witnesses, and partner's involvement in the possible fraudulent creation of that will after the decedent's death. The investigation involved the review of thousands of documents, telephone records, text messages, and an ink testing analysis to test how old the ink was on notes the drafting attorney purportedly drafted in 2017.

Shortly before a scheduled five-day trial before the Milwaukee County Circuit Court, Attorney Lippman successfully negotiated a mediated resolution which resulted in the admission of the older will that had identified the siblings as the sole beneficiaries and the siblings' retention of approximately 88 percent of the estate, or \$5.4 million.

The Inheritance Litigation Team is fortunate to work with incredible clients who have questions or concerns about a loved one's estate plan when there are legitimate questions surrounding that estate plan, whether it be through a will, trust, or payable-on-death transfer.

Upon the completion of this mediation, O'Neil, Cannon, Hollman, DeJong & Laing S.C. was

humbled when its clients, unprompted, shared their thoughts about their experience with Attorney Lippman and the Inheritance Litigation team. Here is what they wrote:

“Professional Integrity and a Very Successful Outcome - Our Experience with O’Neil, Cannon, Hollman, DeJong & Laing.

After our brother died unexpectedly at the age of 60, we had serious concerns about the copy of the will that was produced that did not comport with our understanding of our brother’s estate plans. There were also several oddities with trying to obtain the will itself and with the dynamics of the relationship our brother had with the purported beneficiary under the new will.

As this was the first time we had ever been involved in a legal action, we needed a lot of support and explanation from our attorneys. Their communication skills are second to none and they answered all our questions quickly and guided us through all the issues as they developed. Trevor began the investigation and through many twists, turns and complications was able to discover that our concerns were justified. We cannot say enough about Trevor. He is smart and hardworking, he digs deep into the facts, pulling layer after layer together to tell the true story. He kept us informed of his progress and gave us excellent advice. He is stellar in the courtroom. We cannot recommend him highly enough and we are so proud to have been represented by Trevor. The rest of the team at O’Neil Cannon played an important role to support this lengthy, complex endeavor.”

Trevor C. Lippman is an experienced attorney at the law firm of O’Neil, Cannon, Hollman, DeJong & Laing S.C. Trevor assists clients with all matters related to inheritance disputes, including questions surrounding the creation and administration of trusts and wills. Trevor has assisted hundreds of clients navigate the difficult waters involved in elderly financial abuse allegations and inheritance litigation. Trevor prides himself on protecting the rightful legacies of those who have passed on and seeks to understand each client’s unique concerns. To schedule an initial consult with Attorney Lippman, call 414.276.5000 or email Trevor directly at trevor.lippman@wilaw.com.

ATTORNEY JOSEPH GUMINA RECENTLY QUOTED IN THE DAILY REPORTER



Attorney **Joseph Gumina** was quoted in The Daily Reporter on February 17, 2022, in an article titled "In absence of federal mandate, many companies still encouraging vaccination for employees." In the [article](#), Gumina, who leads OCHDL's labor and employment practice group, discusses what some employers are doing to encourage their employees to get vaccinated. For some construction companies in Wisconsin, the answer was a cash incentive. "The most common cash incentive that I have seen is \$100," said Gumina "Cash incentives are only one of the ways companies have tried to encourage vaccination. Some have brought COVID-19 vaccination clinics to their offices to make it easier for employees to get shots. Others have offered workers an additional day of vacation for getting vaccinated," Gumina said. "I have seen one employer try to encourage its workforce to become vaccinated by informing them that they would not be permitted to return to the office from remote working unless they are fully vaccinated," he added. Whichever course you take, remember OCHDL is here to protect your interests. We encourage you to reach out to our labor and employment law team with any questions, concerns, or legal issues related to workplace safety issues arising from or related to COVID-19.

OCHDL IS PLEASED TO ANNOUNCE THAT NICOLE M. BEITZINGER HAS JOINED THE FIRM



Attorney **Nicole M. Beitzinger**, a graduate of Marquette University Law School, has joined O'Neil, Cannon, Hollman, DeJong & Laing S.C. She will join the Estate and Succession Planning Practice Group. Nicole will assist clients in all matters relating to estate planning, succession planning, and trust and estate administration. She is licensed to practice law in both Wisconsin and Illinois. We are very pleased to have Nicole join OCHDL.

OCHDL, founded in Milwaukee in 1973, is a full-service law firm that focuses on meeting the many needs of businesses and their owners. Our experienced attorneys work with businesses and their owners at all stages of the business life cycle, helping them start, grow, and

transition their businesses. We also assist business owners with their personal legal needs, including tax and estate planning, and family law. For more information about the types of services we provide, please visit our [website](#) or contact your OCHDL attorney.

ATTORNEY JIM DEJONG FEATURED ON WISN AM 1130



Attorney [Jim DeJong](#) was recently featured on *Money Sense* presented by Ellenbecker Investment Group on WISN AM 1130. On the show, Jim provided an overview of the implications of the COVID-19 pandemic on the M&A market. He discussed what a business owner planning to sell a business should be doing now to prepare the business to attract qualified buyers and to obtain the best price. Jim also discussed the importance of business succession planning.

The recording can be accessed [here](#).

THE WILAW QUARTERLY NEWSLETTER



Newsletter Article Highlights:

- Determining the Citizenship of Businesses
- Why Buy-Sell Agreements Are Necessary Even If You Don't Plan to Sell Your Company Soon
- U.S. Supreme Court Issues Stay of OSHA's Vaccination-or-Test Rule
- New Federal Regulations Take Aim at Health Care Provider Billing

Firm News:

- The Firm Welcomes Attorney Patrick Bomhack
- Firm Elects Britany Morrison & Nicholas Chmurski as Shareholders
- Super Lawyers Recognition
- Greg Lyons is Honored as Attorney of the Year by the Top 100 Registry
- Carl Holborn Featured on Money Sense on WISN AM 1130
- Joseph Gumina Recently Quoted in the Milwaukee Business Journal
- Grant Killoran Published by the Association of Corporate Counsel
- OCHDL Ranked in 2022 “Best Law Firms”

Click the image below to read more.



GREG LYONS IS HONORED AS ATTORNEY OF THE YEAR BY THE TOP 100 REGISTRY



Attorney [Greg Lyons](#) is being honored as 2022 Attorney of the Year in the State of Wisconsin and is being featured by the Top 100 Registry in its Top 100 Lawyers magazine. The award distinguishes the highest level of competence and dedication in the field of law according to the Top 100 Registry. The Attorney of the Year is determined by the Top 100 Registry's board of esteemed legal advocates. This is the second "Lawyer of the Year" award recently for Greg. He was also recognized by Best Lawyers® in the practice area of Litigation-Insurance for 2022. Both recognitions are significant, as only one lawyer is honored in his or her location and practice area.

“I am honored to be chosen by my colleagues and experts in the legal field for these awards,” Greg said. “My goal has always been to obtain the best results for my clients in a cost efficient manner.”

Greg represents clients in the prosecution and defense of complex commercial litigation. His extensive experience in commercial litigation has prepared him to successfully represent large corporations as well as small businesses and individuals. He also devotes a large portion of his practice to individuals in inheritance litigation. Greg has successfully litigated many will contests and trust disputes throughout Wisconsin. He has accomplished tremendous results on behalf of trustees, personal representatives, and power of attorneys in large complicated disputes. Greg has appeared in state and federal courts in numerous jurisdictions. He is a member of the Wisconsin state and federal courts, the Seventh Circuit Court of Appeals, and the United States Supreme Court. Greg also serves as the chairperson of the firm’s Ethics Committee.

ATTORNEY GRANT KILLORAN PUBLISHED BY THE ASSOCIATION OF CORPORATE COUNSEL



Attorney [Grant Killoran](#) recently published an article for the Association of Corporate Counsel’s (ACC) resource library. Headquartered in Washington, D.C., the ACC is a global legal association serving the needs of in-house legal counsel around the world.

The article, entitled “Ten Considerations Regarding State Government Public Health Powers to Mandate COVID-19 Protective Measures and Vaccination in the United States,” discusses the existing public health law framework in the United States and summarizes recent decisions by the United States Supreme Court arising from cases challenging public health measures to combat the COVID-19 pandemic.

Read the full article [here](#).

O'NEIL, CANNON, HOLLMAN, DEJONG & LAING S.C. ELECTS BRITANY E. MORRISON AND NICHOLAS G. CHMURSKI AS SHAREHOLDERS



O'Neil, Cannon, Hollman, DeJong & Laing S.C. is pleased to announce that Attorney Britany E. Morrison and Attorney Nicholas G. Chmurski were recently elected as shareholders of the firm. Britany has been with the firm since 2019. Prior to joining OCHDL, she worked at a “Big Four” public accounting firm utilizing her certified public accounting license to help clients manage regulatory compliance risks and enhance returns. Britany focuses on helping clients effectively manage one of their most significant costs—taxes—by advising clients on a variety of federal, state and local, private wealth, employee benefit, real estate, tax-exempt and controversy tax matters. Britany has recently been selected for inclusion on the 2021 Wisconsin Super Lawyers Rising Stars List.

Learn more about Britany by visiting her full [profile](#).

Nick has been with the firm since 2017 and is a member of the firm’s Business Law and Real Estate & Construction Groups. Nick focuses his time helping businesses and developers acquire, sell, and lease real estate. Nick also works closely with issues related to creditors’ rights, including business receiverships and bankruptcies. Nick has also recently been selected for inclusion on the 2021 Wisconsin Super Lawyers Rising Stars List.

Learn more about Nick by visiting his full [profile](#).

Both Britany and Nick are tremendous additions to the shareholder group, and we are proud to have them on our team.

ATTORNEY JOSEPH GUMINA RECENTLY QUOTED IN THE MILWAUKEE BUSINESS JOURNAL



Attorney [Joseph Gumina](#) was recently quoted in the Milwaukee Business Journal published on January 14, 2022, in an article titled “Employers relieved that SCOTUS ruling nixes potential for costly employee COVID-19 tests: Attorneys.” The article outlines the Supreme Court’s recent ruling against OSHA’s vaccination-or-test rule that would have required large employers, starting February 9, to mandate employee vaccinations or require weekly COVID-19 testing of unvaccinated workers.

In the article, Gumina discusses what employers should expect and what he has experienced in his management-side employment practice. “The surge in Omicron variant cases might cause some employers to take temporary measures including shutdowns to keep their workforces healthy,” Gumina said. “They’ve had to adjust and change to address COVID-19 in the workplace on a moment’s notice,” noting the ongoing adjustments employers have made throughout the pandemic on how they operate. Being mindful that OSHA still retains several enforcement tools in its arsenal to address COVID-19 in the workplace, Gumina stated: “I think employers should remain vigilant in making sure they create a safe work environment for all employees.”

For more information on the ruling, read our previous [article](#) detailing the decision.

OCHDL IS PLEASED TO ANNOUNCE THAT PATRICK D. BOMHACK HAS JOINED THE FIRM



Attorney [Patrick D. Bomhack](#), a graduate of the University of Wisconsin Law School, has joined O’Neil, Cannon, Hollman, DeJong & Laing S.C. He will join the firm’s Business Law Practice Group. Patrick has significant experience working in Wisconsin government and politics. While in law school, Patrick was a Judicial Intern for the Honorable William D. Dyke of Iowa County Circuit Court in Dodgeville, Wisconsin. He was also a Law Intern for Legal Action of Wisconsin in Madison, Wisconsin. This broad experience makes Patrick a valuable resource

to the firm, as he is able to contribute across practice groups to help solve a wide range of legal issues. We are very pleased to have Patrick join OCHDL.

OCHDL, founded in Milwaukee in 1973, is a full-service law firm that primarily focuses on providing business law and civil litigation services to closely-held businesses and their owners. The firm represents corporations, institutions, and partnerships at all stages of the business life cycle, helping them start, grow and transition from one generation to the next.