SUPER LAWYERS RECOGNIZES 28 O'NEIL CANNON ATTORNEYS

Each year, *Super Lawyers* surveys the State of Wisconsin's 15,000 attorneys and judges, seeking to recognize the State's top attorneys. Recently, *Super Lawyers* published its lists for 2025, which include the Top 10 Attorneys in Wisconsin, Top 50 Attorneys in Wisconsin, Top 25 Attorneys in Milwaukee, Super Lawyers (consisting of the top 5% of attorneys in Wisconsin), and Rising Stars (consisting of attorneys who are 40 years old or younger or who have been in practice for 10 years or less).

Super Lawyers, who previously referred to the firm as "the Milwaukee mid-sized powerhouse," recognized twenty-eight of our attorneys.

Those attorneys are the following:

- Dino Antonopoulos:
    - Super Lawyer
- Nick Chmurski:
    - Rising Star
- Doug Dehler:
    - Super Lawyer
- Jim DeJong:
    - Super Lawyer
- Seth Dizard:
    - Top 50 Attorneys in Wisconsin
    - Top 25 Attorneys in Milwaukee
    - Super Lawyer
- Maura Falk:
    - Rising Star
- Pete Faust:
    - Top 50 Attorneys in Wisconsin
    - Super Lawyer
- John Gehringer:
    - Super Lawyer
- Joseph Gumina:
    - Super Lawyer
- Jessica Haskell:
    - Rising Star
- Mike Kennedy:
    - Rising Star
- Grant Killoran:
    - Super Lawyer
    - Top 50 Attorneys in Wisconsin
    - Top 25 Attorneys in Milwaukee

- JB Koenings:
    - Super Lawyer
- Dean Laing:
    - Top 10 Attorneys in Wisconsin
    - Top 50 Attorneys in Wisconsin
    - Top 25 Attorneys in Milwaukee
    - Super Lawyer
- Trevor Lippman:
    - Rising Star
- Greg Lyons:
    - Super Lawyer
- Patrick McBride:
    - Super Lawyer
- Jason Meehan:
    - Rising Star
- Joe Newbold:
    - Super Lawyer
- Erica Reib:
    - Rising Star
- Chad Richter:
    - Super Lawyer
- Ryan Riebe:
    - Rising Star
- John Schreiber:
    - Super Lawyer
- Jason Scoby:
    - Super Lawyer
- Steve Slawinski:
    - Super Lawyer
- Kelly Spott:
    - Rising Star
- Christa Wittenberg:
    - Rising Star

Super Lawyers is a national rating service that rates attorneys in all 50 states. The selection process utilized by *Super Lawyers* is multi-phased and includes independent research, peer nominations, and peer evaluations. One court recently had this to say about *Super Lawyers*:

"[T]he selection procedures employed by [*Super Lawyers*] are very sophisticated, comprehensive, and complex. It is abundantly clear . . . that [*Super Lawyers* does] not permit a lawyer to buy one's way onto the list, nor is there any requirement for the purchase of any product for inclusion in the lists or any quid pro quo of any kind or nature associated with the evaluation and listing of an attorney or in the subsequent advertising of one's inclusion in the lists."

We are proud to be one of the few firms in Wisconsin with more than 50% of its attorneys

recognized by *Super Lawyers.*

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18 O'NEIL CANNON LAWYERS SELECTED AS 2026 BEST LAWYERS; ANOTHER 5 NAMED BEST LAWYERS: ONES TO WATCH

We are pleased to announce 18 of our lawyers have been included in the 2026 Edition of *The Best Lawyers in America*, and an additional five have been selected as 2026 *Best Lawyers: Ones to Watch*.

The following are the O'Neil Cannon lawyers named to the 2026 lists:

Best Lawyers in America

- Doug Dehler – Litigation – Insurance
- Jim DeJong – Corporate Law, Mergers and Acquisitions Law, and Securities / Capital Markets Law
- Seth Dizard – Bankruptcy and Creditor Debtor Rights / Insolvency and Reorganization Law and Litigation – Bankruptcy
- Pete Faust – Corporate Law and Mergers and Acquisitions Law
- John Gehringer – Commercial Litigation, Construction Law, Corporate Law, and Real Estate Law
- Joseph Gumina – Employment Law – Management and Litigation – Labor and Employment
- Dennis Hollman – Corporate Law and Trusts and Estates
- Grant Killoran – Commercial Litigation and Litigation – Health Care
- JB Koenings – Corporate Law
- Dean Laing – Commercial Litigation, Personal Injury Litigation – Plaintiffs, and Product Liability Litigation – Defendants
- Greg Lyons – Commercial Litigation and Litigation – Insurance
- Patrick McBride – Commercial Litigation
- Joe Newbold – Commercial Litigation, Litigation – Real Estate, and Personal Injury Litigation – Plaintiffs
- Chad Richter – Business Organizations (including LLCs and Partnerships) and Corporate Law
- John Schreiber – Bankruptcy and Creditor Debtor Rights / Insolvency and Reorganization Law and Litigation – Bankruptcy
- Jason Scoby – Banking and Finance Law, Business Organizations (including LLCs and Partnerships), and Corporate Law

- Steve Slawinski – Construction Law

Best Lawyers: Ones to Watch

- Maura Falk – Trusts and Estates
- Trevor Lippman – Litigation – Trusts and Estates
- Kelly Spott – Trusts and Estate
- Christa Wittenberg – Commercial Litigation

About Best Lawyers

Best Lawyers has published its list for over three decades, earning the respect of the profession, the media, and the public as the most reliable, unbiased source of legal referrals.

Best Lawyers: Ones to Watch recognizes associates and other lawyers who are earlier in their careers for their outstanding professional excellence in private practice in the United States.

Lawyers on *The Best Lawyers in America* and *Best Lawyers: Ones to Watch* lists are divided by geographic region and practice areas. They are reviewed by their peers on the basis of professional expertise, and they undergo an authentication process to make sure they are in current practice and in good standing.

SUPER LAWYERS RECOGNIZES 30 O'NEIL CANNON ATTORNEYS

Each year, *Super Lawyers* surveys the State of Wisconsin's 15,000 attorneys and judges, seeking the State's top attorneys. Recently, *Super Lawyers* published its lists for 2024, which include the Top 10 Attorneys in Wisconsin, Top 50 Attorneys in Wisconsin, Top 25 Attorneys in Milwaukee, Super Lawyers (consisting of the top 5% of attorneys in Wisconsin), and Rising Stars (consisting of attorneys who are 40 years old or younger or who have been in practice for 10 years or less).

Thirty of our attorneys were recognized by *Super Lawyers*, which has referred to the firm as "the Milwaukee mid-sized powerhouse." Those attorneys are the following:

- Emily Behn:
    - Rising Star
- Nick Chmurski:
    - Rising Star
- Doug Dehler:

    - Super Lawyer
- Jim DeJong:
    - Super Lawyer
- Seth Dizard:
    - Top 50 Attorneys in Wisconsin
    - Top 25 Attorneys in Milwaukee
    - Super Lawyer
- Pete Faust:
    - Top 50 Attorneys in Wisconsin
    - Top 25 Attorneys in Milwaukee
    - Super Lawyer
- John Gehringer:
    - Super Lawyer
- Joseph Gumina:
    - Super Lawyer
- Jessica Haskell:
    - Rising Star
- Mike Kennedy:
    - Rising Star
- Grant Killoran:
    - Super Lawyer
- Dean Laing:
    - Top 10 Attorneys in Wisconsin
    - Top 50 Attorneys in Wisconsin
    - Top 25 Attorneys in Milwaukee
    - Super Lawyer
- Trevor Lippman:
    - Rising Star
- Greg Lyons:
    - Super Lawyer
- Patrick McBride:
    - Super Lawyer
- Jason Meehan:
    - Rising Star
- Britany Morrison:
    - Rising Star
- Joe Newbold:
    - Super Lawyer
- Erica Reib:
    - Rising Star
- Chad Richter:
    - Super Lawyer
- Ryan Riebe:
    - Rising Star
- John Schreiber:
    - Super Lawyer
- Jason Scoby:

    - Super Lawyer
- Steve Slawinski:
    - Super Lawyer
- Kelly Spott:
    - Rising Star
- Christa Wittenberg:
    - Rising Star

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"[T]he selection procedures employed by [*Super Lawyers*] are very sophisticated, comprehensive, and complex. It is abundantly clear . . . that [*Super Lawyers* does] not permit a lawyer to buy one's way onto the list, nor is there any requirement for the purchase of any product for inclusion in the lists or any quid pro quo of any kind or nature associated with the evaluation and listing of an attorney or in the subsequent advertising of one's inclusion in the lists."

We are proud to be one of the few firms in Wisconsin that had more than 50% of its attorneys receive recognition by *Super Lawyers.*

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20 O'NEIL CANNON LAWYERS SELECTED AS 2025 BEST LAWYERS; ANOTHER 5 NAMED BEST LAWYERS: ONES TO WATCH

We are pleased to announce 20 of our lawyers have been included in the 2025 Edition of *The Best Lawyers in America*, and an additional five have been selected as 2025 *Best Lawyers: Ones to Watch*.

The following are the O'Neil Cannon lawyers named to the 2025 lists:

Best Lawyers in America

- Doug Dehler – Litigation – Insurance
- Jim DeJong – Corporate Law, Mergers and Acquisitions Law, and Securities / Capital Markets Law
- Seth Dizard – Bankruptcy and Creditor Debtor Rights / Insolvency and Reorganization Law and Litigation – Bankruptcy
- Pete Faust – Corporate Law and Mergers and Acquisitions Law

- John Gehringer – Commercial Litigation, Construction Law, Corporate Law, and Real Estate Law
- Joseph Gumina – Employment Law – Management and Litigation – Labor and Employment
- Dennis Hollman – Corporate Law and Trusts and Estates
- Grant Killoran – Commercial Litigation and Litigation – Health Care
- JB Koenings – Corporate Law
- Dean Laing – Commercial Litigation, Personal Injury Litigation – Plaintiffs, and Product Liability Litigation – Defendants
- Greg Lyons – Commercial Litigation and Litigation – Insurance
- Patrick McBride – Commercial Litigation
- Joe Newbold – Commercial Litigation, Litigation – Real Estate, and Personal Injury Litigation – Plaintiffs
- Chad Richter – Business Organizations (including LLCs and Partnerships) and Corporate Law
- John Schreiber – Bankruptcy and Creditor Debtor Rights / Insolvency and Reorganization Law and Litigation – Bankruptcy
- Jason Scoby – Banking and Finance Law, Business Organizations (including LLCs and Partnerships), and Corporate Law
- Steve Slawinski – Construction Law

Best Lawyers: Ones to Watch

- Emily Behn – Commercial Litigation
- Trevor Lippman – Litigation – Trusts and Estates
- Erica Reib – Labor and Employment Law – Management and Litigation – Labor and Employment
- Kelly Spott – Trusts and Estates
- Christa Wittenberg – Commercial Litigation

About Best Lawyers

Best Lawyers has published their list for over three decades, earning the respect of the profession, the media, and the public as the most reliable, unbiased source of legal referrals.

Best Lawyers: Ones to Watch recognizes associates and other lawyers who are earlier in their careers for their outstanding professional excellence in private practice in the United States.

Lawyers on *The Best Lawyers in America* and *Best Lawyers: Ones to Watch* lists are divided by geographic region and practice areas. They are reviewed by their peers on the basis of professional expertise, and they undergo an authentication process to make sure they are in current practice and in good standing.

KELLY SPOTT ELECTED PRACTICE GROUP LEADER FOR THE TRUST, ESTATES AND SUCCESSION PLANNING GROUP

O'Neil Cannon proudly announces the election of Kelly Spott as the practice group leader for the Trust, Estates and Succession Planning Group, effective July 1, 2024.

"I am honored to have been elected as the new practice group leader for the Trust, Estates and Succession Planning Group," said Spott. "I look forward to leveraging my experience and passion for assisting families to further strengthen our services in estate planning and tax matters."

Spott has been a vital part of the O'Neil Cannon team since 2017, specializing in estate planning, succession planning, probate administration, trust administration, and inheritance litigation. She is licensed to practice in Wisconsin and Florida.

SUPER LAWYERS RECOGNIZES 28 O'NEIL CANNON ATTORNEYS

Each year, *Super Lawyers* surveys the State of Wisconsin's 15,000 attorneys and judges, seeking the State's top attorneys. Recently, *Super Lawyers* published its lists for 2023, which include the Top 10 Attorneys in Wisconsin, Top 50 Attorneys in Wisconsin, Top 25 Attorneys in Milwaukee, Super Lawyers (consisting of the top 5% of attorneys in Wisconsin), and Rising Stars (consisting of attorneys who are 40 years old or younger or who have been in practice for 10 years or less).

Twenty-nine of our attorneys were recognized by *Super Lawyers*, which has referred to the firm as "the Milwaukee mid-sized powerhouse." Those attorneys are the following:

- Nick Chmurski:
    - Rising Star
- Doug Dehler:
    - Super Lawyer
- Jim DeJong:
    - Super Lawyer
- Seth Dizard:
    - Top 50 Attorneys in Wisconsin

    - Top 25 Attorneys in Milwaukee
    - Super Lawyer
- Pete Faust:
    - Super Lawyer
- John Gehringer:
    - Super Lawyer
- Joseph Gumina:
    - Super Lawyer
- Jessica Haskell:
    - Rising Star
- Mike Kennedy:
    - Rising Star
- Grant Killoran:
    - Super Lawyer
- Dean Laing:
    - Top 10 Attorneys in Wisconsin
    - Top 50 Attorneys in Wisconsin
    - Top 25 Attorneys in Milwaukee
    - Super Lawyer
- Trevor Lippman:
    - Rising Star
- Greg Lyons:
    - Super Lawyer
- Patrick McBride:
    - Super Lawyer
- Britany Morrison:
    - Rising Star
- Joe Newbold:
    - Super Lawyer
- Erica Reib:
    - Rising Star
- Chad Richter:
    - Super Lawyer
- Ryan Riebe
    - Rising Star
- John Schreiber:
    - Super Lawyer
- Jason Scoby:
    - Super Lawyer
- Steve Slawinski:
    - Super Lawyer
- Kelly Spott:
    - Rising Star
- Christa Wittenberg:
    - Rising Star

Super Lawyers is a national rating service that rates attorneys in all 50 states. The selection

process utilized by *Super Lawyers* is multi-phased and includes independent research, peer nominations, and peer evaluations. One court recently had this to say about *Super Lawyers*:

> "[T]he selection procedures employed by [*Super Lawyers*] are very sophisticated, comprehensive and complex. It is abundantly clear . . . that [*Super Lawyers* does] not permit a lawyer to buy one's way onto the list, nor is there any requirement for the purchase of any product for inclusion in the lists or any quid pro quo of any kind or nature associated with the evaluation and listing of an attorney or in the subsequent advertising of one's inclusion in the lists."

We are proud to be one of the few firms in Wisconsin that had more than 50% of its attorneys receive recognition by *Super Lawyers.*

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19 O'NEIL CANNON LAWYERS SELECTED AS 2024 BEST LAWYERS; ANOTHER 4 NAMED BEST LAWYERS: ONES TO WATCH

We are pleased to announce 19 of our lawyers have been included in the 2024 Edition of *The Best Lawyers in America*, and an additional four have been selected as 2024 *Best Lawyers: Ones to Watch*.

The following are the O'Neil Cannon lawyers named to the 2024 lists:

Best Lawyers in America

- Douglas P. Dehler – Litigation – Insurance
- James G. DeJong – Corporate Law, Mergers and Acquisitions Law, and Securities / Capital Markets Law
- Seth E. Dizard – Bankruptcy and Creditor Debtor Rights / Insolvency and Reorganization Law and Litigation – Bankruptcy
- Peter J. Faust – Corporate Law and Mergers and Acquisitions Law
- John G. Gehringer – Commercial Litigation, Construction Law, Corporate Law, and Real Estate Law
- Joseph E. Gumina – Employment Law – Management and Litigation – Labor and

Employment

- Dennis W. Hollman – Corporate Law and Trusts and Estates
- Grant C. Killoran – Commercial Litigation and Litigation – Health Care
- JB Koenings – Corporate Law
- Dean P. Laing – Commercial Litigation, Personal Injury Litigation – Plaintiffs, and Product Liability Litigation – Defendants
- Gregory W. Lyons – Commercial Litigation and Litigation – Insurance
- Patrick G. McBride – Commercial Litigation
- Joseph D. Newbold – Commercial Litigation
- Chad J. Richter – Business Organizations (including LLCs and Partnerships) and Corporate Law
- John R. Schreiber – Bankruptcy and Creditor Debtor Rights / Insolvency and Reorganization Law and Litigation – Bankruptcy
- Jason R. Scoby – Corporate Law
- Steven J. Slawinski – Construction Law

Best Lawyers: Ones to Watch

- Trevor C. Lippman – Litigation – Trusts and Estates
- Erica N. Reib – Labor and Employment Law – Management and Litigation – Labor and Employment
- Kelly M. Spott – Trusts and Estates
- Christa D. Wittenberg – Commercial Litigation

About Best Lawyers

Best Lawyers has published their list for over three decades, earning the respect of the profession, the media, and the public as the most reliable, unbiased source of legal referrals.

Best Lawyers: Ones to Watch recognizes associates and other lawyers who are earlier in their careers for their outstanding professional excellence in private practice in the United States.

Lawyers on *The Best Lawyers in America* and *Best Lawyers: Ones to Watch* lists are divided by geographic region and practice areas. They are reviewed by their peers on the basis of professional expertise, and they undergo an authentication process to make sure they are in current practice and in good standing.

SUPER LAWYERS RECOGNIZES 25 O'NEIL CANNON ATTORNEYS

Each year, *Super Lawyers* surveys the State of Wisconsin's 15,000 attorneys and judges, seeking the State's top attorneys. Recently, *Super Lawyers* published its lists for 2022, which include the Top 10 Attorneys in Wisconsin, Top 50 Attorneys in Wisconsin, Top 25 Attorneys in Milwaukee, Super Lawyers (consisting of the top 5% of attorneys in Wisconsin), and Rising Stars (consisting of attorneys who are 40 years old or younger or who have been in practice for 10 years or less).

Twenty-five of our attorneys were recognized by *Super Lawyers*, which has referred to the firm as "the Milwaukee mid-sized powerhouse." Those attorneys are the following:

- Nicholas G. Chmurski:
  - Rising Stars
- Douglas P. Dehler:
  - Super Lawyer
- James G. DeJong:
  - Super Lawyer
- Seth E. Dizard:
  - Top 50 Attorneys in Wisconsin
  - Top 25 Attorneys in Milwaukee
  - Super Lawyer
- Peter J. Faust:
  - Super Lawyer
- John G. Gehringer:
  - Super Lawyer
- Joseph E. Gumina:
  - Super Lawyer
- Jessica K. Haskell:
  - Rising Stars
- Grant C. Killoran:
  - Super Lawyer
- Dean P. Laing:
  - Top 10 Attorneys in Wisconsin
  - Top 50 Attorneys in Wisconsin
  - Top 25 Attorneys in Milwaukee

    - Super Lawyer
- Trevor C. Lippman:
    - Rising Stars
- Gregory W. Lyons:
    - Super Lawyer
- Patrick G. McBride:
    - Super Lawyer
- Britany E. Morrison:
    - Rising Stars
- Joseph D. Newbold:
    - Super Lawyer
- Erica N. Reib:
    - Rising Stars
- Chad J. Richter:
    - Super Lawyer
- John R. Schreiber:
    - Super Lawyer
- Jason R. Scoby:
    - Super Lawyer
- Steven J. Slawinski:
    - Super Lawyer
- Kelly M. Spott:
    - Rising Stars
- Christa D. Wittenberg:
    - Rising Stars

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We are proud to be one of the few firms in Wisconsin that had more than 50% of its attorneys

receive recognition by *Super Lawyers.*

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19 OCHDL LAWYERS SELECTED AS 2023 BEST LAWYERS®; ANOTHER 4 NAMED BEST LAWYERS: ONES TO WATCH

We are pleased to announce 19 of our lawyers have been included in the 2023 Edition of *The Best Lawyers in America,* and an additional four have been selected as 2023 *Best Lawyers: Ones to Watch*.

The following are the O'Neil, Cannon, Hollman, DeJong and Laing lawyers named to the 2023 lists:

Best Lawyers in America

- Douglas P. Dehler – Litigation – Insurance
- James G. DeJong – Corporate Law, Mergers and Acquisitions Law, and Securities / Capital Markets Law
- Seth E. Dizard – Bankruptcy and Creditor Debtor Rights / Insolvency and Reorganization Law and Litigation – Bankruptcy
- Peter J. Faust – Corporate Law and Mergers and Acquisitions Law
- John G. Gehringer – Commercial Litigation, Construction Law, Corporate Law, and Real Estate Law
- Joseph E. Gumina – Employment Law – Management and Litigation – Labor and Employment
- Dennis W. Hollman – Corporate Law and Trusts and Estates
- Grant C. Killoran – Commercial Litigation and Litigation – Health Care
- JB Koenings – Corporate Law
- Dean P. Laing – Commercial Litigation, Personal Injury Litigation – Plaintiffs, and Product Liability Litigation – Defendants
- Gregory W. Lyons – Commercial Litigation and Litigation – Insurance
- Patrick G. McBride – Commercial Litigation
- Joseph D. Newbold – Commercial Litigation

- Chad J. Richter – Business Organizations (including LLCs and Partnerships) and Corporate Law
- John R. Schreiber – Bankruptcy and Creditor Debtor Rights / Insolvency and Reorganization Law and Litigation – Bankruptcy
- Jason R. Scoby – Corporate Law
- Steven J. Slawinski – Construction Law

Best Lawyers: Ones to Watch

- Trevor C. Lippman – Litigation – Trusts and Estates
- Erica N. Reib – Labor and Employment Law – Management and Litigation – Labor and Employment
- Kelly M. Spott – Trusts and Estates
- Christa D. Wittenberg – Commercial Litigation

About Best Lawyers

Best Lawyers has published their list for over three decades, earning the respect of the profession, the media, and the public as the most reliable, unbiased source of legal referrals.

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Lawyers on *The Best Lawyers in America* and *Best Lawyers: Ones to Watch* lists are divided by geographic region and practice areas. They are reviewed by their peers on the basis of professional expertise, and they undergo an authentication process to make sure they are in current practice and in good standing.

TAX AND WEALTH ADVISOR ALERT: WHAT IS AN ESTATE PLAN?

We are often asked, “What is an estate plan?” An estate plan can mean different things depending on your unique personal and financial situation. We structure your estate plan based on many things, such as whether you are single, married, or divorced; whom you want your estate to pass to upon your death; and the complexity and makeup of your assets. Some individuals may need more estate planning, some may need less.

Here is a list of the typical documents we include in an “estate plan.”

Revocable Trust

People often come to us asking for a “simple” Will. However, a Will-based estate plan is not always the best choice. A “simple” Will now may cause beneficiaries significant cost and delay, later, when the Will gets probated. This is why we often recommend that our clients establish a “Revocable Trust.”

A Revocable Trust is a trust that you create during your lifetime and acts as the “centerpiece” of your estate plan. The Trust is designed to help you manage your assets during your lifetime and to designate who will receive your property upon your death. You are the “grantor” or creator of the Trust and serve as Trustee during your lifetime, so you still retain control over the assets in your Trust. The Trust is both completely amendable and revocable during your lifetime.

Upon your death, your trust property is divided and distributed to your named beneficiaries, often your children. A share for a beneficiary can either be distributed outright and free of trust, or it can be held in trust for that beneficiary’s benefit. A share held in trust can be useful for a beneficiary to protect from creditors and divorce, or if a beneficiary is a spendthrift.

Married couples often create a “joint” Revocable Trust together. A joint Revocable Trust is a useful tool to minimize taxes and effectively manage a married couple’s assets, before and after death.

A Revocable Trust is particularly useful if you have minor children, you own your own business, or you own real property in multiple states. The Trust also makes the administration of your assets more efficient if you become incapacitated.

Last Will and Testament

Even if you have a Revocable Trust in place, it is still necessary to have a Will. This is what we refer to as a “Pour-Over Will.” The Pour-Over Will serves a few important purposes. First, in the event that you fail to re-title an asset into your revocable trust, the Pour-Over Will is designed to receive those assets upon your death and “pour” them into your Revocable Trust. Second, the Pour-Over Will is the only place you can nominate a guardian for your minor children if you were to unexpectedly pass away. Finally, the Pour-Over Will distributes your personal property, such as your furniture, household items, clothing, etc. to your intended beneficiaries.

Martial Property Agreement

For married couples, we often draft a Marital Property Agreement. This agreement allows married couples to “opt in” to Wisconsin’s marital property system by classifying most of your assets as marital property upon yours and your spouse’s deaths. The Marital Property Agreement also contains a “Washington Will Provision,” which means the surviving spouse can fund the trust upon the death of the first spouse and thus avoid probate. This agreement, however, does not address divorce and is used solely for estate planning purposes.

Durable Power of Attorney

In the event that you become incapacitated as a result of an accident or illness, you can appoint an “agent” in your Durable Power of Attorney to oversee your financial affairs. We are often asked what the difference is between an “agent” and a “trustee.” An “agent” manages the assets outside of your Revocable Trust, while a “trustee” manages the assets held by your Trust. A Durable Power of Attorney offers great flexibility in administering your financial affairs and also allows you to avoid a costly guardianship proceeding.

Health Care Power of Attorney

A Health Care Power of Attorney allows you to appoint an individual to make health care decisions on your behalf in the event that you are unable to do so yourself. The document also allows you to express your wishes regarding entering a nursing home or community-based residential facility when the need arises, as well as other important end-of-life decisions.

HIPAA Release and Authorization

The Health Insurance Portability and Accountability Act was passed into law in 1996. This Act prevents medical professionals from divulging your personal medical records to family members or other individuals. Because of this, it is often difficult for family members to gain access to your medical information in the event of an emergency. Our HIPAA Release and Authorization allows medical professionals to release your personal medical records to persons of your choosing (often family members) to help manage your care.

Deed

If you establish a Revocable Trust, an important step is re-titling your real property into the name of your Revocable Trust. Thus, upon your death, you avoid having the real estate pass through probate, and your Trustee will have the ability to maintain, manage, and/or sell your real property upon your death. This step is especially important for property owned outside of Wisconsin. If you fail to transfer your real property into your Revocable Trust, you risk needing an “ancillary” probate in the state in which your real property is located. This can be a costly and tedious step we try to avoid.