HUSCH BLACKWELL



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OVERVIEW

For Phil, estate and business succession planning is more than a job; it's a passion he pursues, employing his strong tax and accounting background to clients' benefit.

Phil counsels clients on estate planning, business succession planning, probate and trust administration, marital property and tax planning. He helps them achieve their objectives while minimizing taxes and expenses, and managing risk.

Phil is proficient in matters involving unique assets, international considerations and beneficiaries with special needs. On countless occasions, he has provided fiduciary counseling to trustees when they needed guidance or intervention to help disgruntled beneficiaries understand trusts.

Industry

Financial Services & Capital Markets

Services

Business Succession Planning

Litigation & Alternative Dispute Resolution

Private Wealth

Trust, Estate, & Fiduciary Litigation

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Experience

- Advised a family on the transfer of their family manufacturing business to the fourth generation with no federal estate tax.
- Counseled trustees on trust administration issues to defeat claims by unhappy beneficiaries.
- Created co-ownership agreements for airplane, sailboat and real property.
- Advised third generation of same family on estate planning and trust administration.
- Worked with numerous business owners to transition ownership of family businesses to next generation at reduced or no tax cost using gifting, valuation discounts and other tax-saving strategies. Designed estate plans that treat children not involved in the business fairly.
- Designed estate plans for parents of special-needs children to provide for their long-term care and preserve their eligibility for various benefits.
- Successfully defended estate in Tax Court case involving issues of marital property classification of assets.
- Assisted in establishing Qualified Domestic Trust for the benefit of a non-U.S. citizen surviving spouse, and the later conversion of that trust to a regular marital deduction trust.
- Created numerous trusts for the preservation of firearm collections. Worked with owners of regulated firearms to ensure compliance with rules regarding ownership and possession of regulated items.

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Recognition

- Martindale-Hubbell AV Preeminent
- *The Best Lawyers in America®*
  - Trusts and Estates, 2007-2027
  - Best Lawyers® Trusts and Estates "Lawyer of the Year," Milwaukee, 2016, 2018
- *Wisconsin Super Lawyers*, 2005-2025
- Five Star Professionals, Five Star Estate Planning Attorney, 2014-2015, Five Star Wealth Manager, 2009-2013

Education

- J.D., Marquette University Law School
  - *cum laude*
- B.S., Boston College
  - Accounting
  - *cum laude*

Admissions

- U.S. District Court, Eastern District of Wisconsin
- Wisconsin
- U.S. District Court, Western District of Wisconsin
- U.S. Tax Court

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Community Leadership

For more than 20 years, Phil has presented at two courses he helped create for the State Bar of Wisconsin's Continuing Legal Education Department, PINNACLE. In both, he shares current and practical legal information and resources. Phil also speaks frequently to community groups about estate planning, business succession planning, marital property and probate. Additionally, he taught at Marquette University Law School for five years.

Phil values the opportunities Husch Blackwell provides for its attorneys to do pro bono work and takes on several cases a year.

- Marquette University High School Trap, Skeet and Sporting Clays Teams, Assistant Coach, 2011-present
- Bishop Leo J. Brust Council Holding Company, Inc., Board of Directors, President, 2006-present; Board Member, 1993-present
- Elmbrook Education Foundation, Inc., Board of Directors 2010-2013
- Life's Navigators, Trust Committee Member, 20017-present
- Association for the Rights of Citizens with handicaps (ARCh), volunteer



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