



Kelsey Berns Featured in MKE Lifestyle Magazine on Wealth Management

Kelsey Berns was featured in *MKE Lifestyle*, "[Becoming a Smarter Investor](#)," for their wealth management segment of the July 2024 issue. In it, she emphasizes the importance of net worth statements in estate planning and underscores their role in informing critical decisions regarding estate taxes, liquidity and asset valuation. Berns also highlights the significance of life insurance policies in mitigating estate taxes, especially for clients with substantial illiquid assets. She introduces strategies like irrevocable life insurance trusts and the IRS's 6166 election as potential solutions.

Berns is a shareholder in Reinhart's Trust and Estates Practice, advising high-net-worth individuals and families on estate planning matters, such as complex wealth transfers, charitable giving and tax strategies. She frequently counsels business owners on succession planning strategies designed to maximize value and minimize income and wealth transfer taxes.

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Jul 31, 2024

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