



## **Nathan K. Johnson** Shareholder

WAUKESHA

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Nathan K. Johnson is a shareholder in the firm's Trusts and Estates Practice. He serves a wide range of clients including individuals, closely held businesses and charitable organizations. Nate is a Certified Public Accountant, and spent several years as an accountant.

This experience, combined with his knowledge of estate planning and tax law, enables Nate to recognize the goals and challenges of clients and to create appropriate financial solutions.

Nate also speaks on a variety of professional topics to business audiences, including financial institutions and professional organizations.

## **Education**

- J.D., cum laude, Marquette University Law School
- B.B.A., University of Wisconsin-Whitewater (Accounting and Finance)

## **Bar Admissions**

Wisconsin, Arizona

## **Practices**

- Trusts and Estates

## **Services**

- Estate, Gift and Generation-Skipping Transfer Tax Planning
- Trust Services
- Trust, Estate and Fiduciary Litigation
- Family Office Services
- Family-Owned Business



- Tax-Exempt Organizations
- Arizona/California/Florida/Illinois/South Dakota Law Consultations
- Charitable Contributions and Planning
- Estate Planning
- Gift and Estate Tax Audits
- Prenuptial Agreements/Marital Agreements
- Retirement Planning/IRA Planning
- Trust and Estate Administration

## Matters

- Drawing on his accounting, as well as his legal background, to advise a large public charitable organization on fiduciary accounting and tax issues
- Developing and implementing a comprehensive succession plan for a closely held family business to enable the family to transition the business to other family members and to achieve their desired charitable giving

## Honors & Affiliations

### Honors

- *Best Lawyers in America*, Litigation – Trusts and Estates; Nonprofit / Charities Law; Tax Law; Trusts and Estates
- Named a FIVE STAR Wealth Manager
- Selected for inclusion in *Wisconsin Super Lawyers* (2024-present)
- Selected for inclusion in *Wisconsin Super Lawyers* - Rising Star Edition (2009-2011; 2013-2014)

### Affiliations

- State Bar of Wisconsin
- Milwaukee Bar Association
- American Bar Association (Real Property, Probate and Trust Law Sections)
- St. Camillus Foundation (Board of Directors)