Wendy S. Rusch

Shareholder

WAUKESHA

OFFICE:
262.951.4518

wrusch@reinhartlaw.com

LinkedIn:
https://www.linkedin.com/pub/wendy-rusch/32/a82/352

Wendy S. Rusch is a shareholder in Reinhart's Trusts and Estates Practice. Wendy's clients include owners of family-controlled companies and high-net-worth individuals primarily in the Waukesha, Madison, and Milwaukee areas. Her practice focuses on estate planning, family business succession planning, retirement planning, prenuptial and postnuptial agreements, as well as probate and trust administration. She also represents fiduciaries and beneficiaries in estate and trust disputes and advises clients on a wide variety of estate, gift and income tax issues. Wendy is a Fellow and Wisconsin State Chair of The American College of Trust and Estate Counsel (ACTEC) and an Accredited Estate Planner (AEP) through the National Association of Estate Planners & Councils.

Drawing from her breadth of knowledge and experience, Wendy offers clients practical solutions to problems, and clients appreciate her approachable and empathetic disposition. While the services Wendy provides vary from client to client, one thing remains consistent throughout the importance she places on client comprehension. She takes time to explain complicated legal issues to her clients in a manner designed to ensure that they fully understand their options.

One of the most fulfilling aspects of Wendy's work is her involvement in succession planning and watching the successful transition of a family business from one generation to the next. This process is different for every client and is a very personal matter that she considers not only a responsibility but also a privilege to be part of. Licensed in Wisconsin and South Dakota, Wendy is able to assist high-net-worth individuals who are interested in exploring the income tax and trust laws that each state offers.

Education

- J.D., magna cum laude, University of Wisconsin Law School (Order of the Coif)
- B.S., with honors, Cornell University (Industrial and Labor Relations)

Bar Admissions

Wisconsin, South Dakota

Practices

- Trusts and Estates

Services

- Estate, Gift and Generation-Skipping Transfer Tax Planning
- Succession Planning
- Family-Owned Business
- Trust, Estate and Fiduciary Litigation
- Federal Tax Controversy and Litigation
- Family Office Services
- Estate Planning
- Trust and Estate Administration
- Gift and Estate Tax Audits
- Prenuptial Agreements/Marital Agreements
- Retirement Planning/IRA Planning
- Charitable Contributions and Planning
- Arizona/California/Florida/Illinois/South Dakota Law Consultations

Matters

- Assisting families with the transition of their wealth in a tax-advantaged manner
- Developing succession plans for closely-held business owners
- Designing prenuptial agreements that protect family wealth and business interests
- Advising individual and corporate trustees regarding ongoing trust administration matters, including tax and beneficiary controversies, and termination

Honors & Affiliations

Honors

- The American College of Trust and Estate Counsel (ACTEC), Fellow, Wisconsin State Chair

- *Best Lawyers in America* (Trusts and Estates)
- Selected for inclusion in *Wisconsin Super Lawyers*
- Named a Five Star Estate Planning Attorney by *Five Star Professional* (13 years)

- Accredited Estate Planner (AEP) through the National Association of Estate Planners & Councils
- Chambers' High Net Worth recognition as a leader in her field for Private Wealth Law
- Peer Review Rated as AV® Preeminent, the highest performance rating in Martindale-Hubbell's peer review rating system
- 10.0 Rating (Highest Rating) by AVVO

Affiliations

- Waukesha County Estate Planning Council (Vice President)
- Waukesha County Bar Association (Probate & Estate Planning Section, Vice Chair)
- Milwaukee Estate Planning Forum (Past President)
- Milwaukee Bar Association
- State Bar of Wisconsin
- State Bar of South Dakota

Presentations

- "Transferring Business Interests in an Ever Changing Tax Environment," Milwaukee Estate Planning Forum, December 1, 2021
- "Transferring Business Interests During Lifetime: How to Have Your Cake and Eat it Too," Wisconsin State Bar, October 20, 2021
- "Innovative Buy-Sell Planning Strategies to Engage Business Owner Clients," Northwestern Mutual Professional Growth Association Luncheon, July 23, 2019
- "Smart Governance Structures - The Keys to Success in Shared Ownership," Milwaukee Business Journal's Family Owned Business Event, May 21, 2019
- "Retirement Account Beneficiary Designations," Waukesha County Bar Association Probate & Estate Planning Section, January 8, 2019
- "Estate Planning After the 2017 Tax Act and Select Recent Wisconsin Developments," WICPA-NACVA Valuation Conference, October 31, 2018
- "Fiduciary and Transferee Personal Liability for Estate, Gift, and Income Tax (and the Impact of Tax Apportionment on the Same)," Mid-Winter Estate Planning Clinic, February 6, 2018
- "Estate Planning Beyond Wills and Revocable Trusts," Presbyterian Homes Foundation, September 26, 2017

- "Estate Planning Essentials," Humane Animal Welfare Society, August 2017
- "Wills, Trusts, and Beneficiary Designations: How They Work Together," Froedtert & the Medical College of Wisconsin, April 26, 2017 (co-presenter)
- "Estate Planning for Pet Owners," Marquette University Law School, April 27 and November 7, 2016
- "Tax Efficient Wealth Management Structures for High Net Worth Families," WICPA Tax Conference, November 3, 2016
- "Keeping the Farm in the Family," Ag Resource Day (Oconomowoc, WI) March 2016
- "Financial Strategies for Successful Retirement," University of Wisconsin-Milwaukee Continuing Education Seminar, July 2014; February, June and October 2015; February, June and October 2016; June 2017
- "Estate Planning for Pet Owners," Humane Animal Welfare Society, February 23 and March 9, 2015; April 27, 2016
- "Taking Control of Your Estate Plan," Presbyterian Homes Foundation, October 2015
- "Irrevocable Life Insurance Trusts," National Business Institute's Trusts 101, June 2014
- "The New Wisconsin Trust Code," Presbyterian Homes Foundation, October 2014
- "The Effect of Portability and a $5,000,000 Estate Tax Exemption on Estate Planning Document Drafting," Mid-Winter Estate Planning Clinic, March 4, 2014
- "Taking Control of Your Estate Plan," American Legion 2014 Midwinter Conference, January 18, 2014
- "Charitable Gift Annuities," Partnership for Philanthropic Planning of Eastern Wisconsin Planned Giving Workshops, May 23, 2013
- "Business Succession Planning for Family & Closely Held Businesses," The Alternative Board, March 20, 2013
- "Critical Charitable Giving Issues to Watch for in Federal Legislation," Partnership for Philanthropic Planning of Eastern Wisconsin, January 10, 2013

Presentations

- Does the Corporate Transparency Act Affect Me? It Might., Blue Magazine (Author; September 2023)
- *Marital Property Law & Practice in Wisconsin*, Published by State Bar of Wisconsin (Co-author)