



## Joan D. Klimpel

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Milwaukee

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### Practice Areas

Estate Planning, Estate & Trust Administration

### Admissions

Wisconsin

### Education

Juris Doctor, University of Wisconsin Law School, *with honors*, Order of the Coif

Bachelor of Business Administration, University of Wisconsin-Madison, 1989, Accounting, *with honors*

Joan Klimpel is a shareholder and a member of the Estate Planning Practice Group in the Milwaukee and Waukesha offices. She represents clients in the areas of fiduciary income taxation, estate and gift taxation, probate and trust administration, business succession planning and the drafting of wills, trusts and related estate planning documents.

In addition to working with clients on more traditional estate planning matters, Joan has advised clients on the use of estate planning techniques focused on leveraging the use of tax exemptions and in some cases addressing closely held business succession and/or philanthropic objectives, including Irrevocable Life Insurance Trusts, Grantor Retained Annuity Trusts, Charitable Lead Trusts, Charitable Remainder Trusts, sales to defective Grantor Trusts and the creation and administration of family foundations.

Joan has worked with members of the fiduciary litigation team to resolve disputes relating to the administration of irrevocable trusts and estates. At the request of clients, Joan serves as trustee for over 150 trusts and is involved on a daily basis in distribution and income tax planning for these trusts. Joan, along with attorneys on the securities and corporate teams, assisted a client with assessing alternatives to and ultimately implementing an Initial Public Offering structured to maintain family control for multiple generations, and Joan continues to serve as a trustee of trusts holding shares of the company and to provide legal counsel to the board and its corporate governance committee. Joan serves as an officer and board member of one of the largest family foundations in Wisconsin.

### Professional Association Memberships

Milwaukee Bar Association

### Activities

Certified Public Accountant

Greater Milwaukee Foundation – Member, Development & Philanthropic Services Committee

Milwaukee Mid-Winter Estate Planning Clinic - Member

Children's Hospital and Health System – Chair, Planned Giving Council

Milwaukee Estate Planning Association – Member

Godfrey & Kahn Management Committee – Member

Godfrey & Kahn Compensation Committee – Member

## Honors

Listed in *Best Lawyers in America* (Trusts and Estates, 2009 - present)

Recognized as a Five Star Wealth Manager (2010)

Recognized as a *Wisconsin Super Lawyer* (2010 - 2018)

Recognized as a Women in the Law by *Wisconsin Law Journal* (2014)

Recognized by *Chambers USA* (High Net Worth: Private Wealth Law, 2021)