

Corporate & Securities

Our corporate and transactional attorneys counsel emerging businesses, public corporations and privately owned businesses. Our attorneys help clients solve problems, achieve goals and minimize risk.

We understand the multi-faceted issues faced by businesses in industries including manufacturing, professional services, national and international distribution, retail, technology, nonprofit organizations, and commercial real estate, and our attorneys are equipped to assist clients in all stages of business development and governance, corporate finance and securities and mergers and acquisitions.

Our corporate services address:

- Corporate and Securities
- Mergers & Acquisitions
- General Counsel Capability
- Securities & Capital Markets
- Shareholder Activism
- Securities Enforcement
- Venture Capital and Private Equity
- Commercial Lending
- Money Management/Investment Adviser
- Corporate Governance
- Commercial Contracts
- Insurance Transactions
- Joint Ventures and Strategic Alliance Agreements
- Nonprofit

Experience

Assisted a Local Financial Institution in the Preparation of Loan Documentation for a Large Number of New and Renewing Borrowers

Assisted in the Asset and Real Estate Sale of a Local Brewery Business

Served as Outside Counsel for a Market Leader of Direct Thermal Paper and Film Products in North America

PROFESSIONALS

Kathryn M. Blom
Partner

John F. D'Jock
Associate

Joe Demko
Partner

Kevin L. Eismann
Partner

Danielle Snyder Fadel
Partner

Timothy J. Feldhausen
Partner

Eric M. Fogel
Partner

Ethan C. Geis
Associate

Lawrence J. Glusman
Partner

Brad Goss
Partner

Katherine M. Hampel
Associate

Alexis M. Hedtke
Associate

Charles I. Henderson
Of Counsel

Christopher J. Jaekels
Partner

Larry H. James
Partner

Lisa A. Johnson
Partner

Howard M. Lang
Of Counsel

Alice A. Lin
Partner

Serves as Acting In-House Counsel for an Industry Leading Global Supplier and Distributor of Automotive Parts and Accessories

Counsels a Global Supplier and Distributor of Automotive Parts and Accessories in Negotiation and Execution of Manufacturing Supply Agreements

Successfully Advised a Wisconsin-based Equipment Manufacturer on Dealer Contract Amendments and Terminations

Successfully Represented a Group of Investors in the Purchase of a Local Golf Course

Successfully Advised a Leading Midwestern Cold Storage Client on the Sale of Multiple Facilities Located in Several States

Successfully Represented a Major Hotel Chain in the Purchase of a Historic Hotel Out of Bankruptcy and Advised on Real Estate, Franchise and Operational Issues

Represented a Home Remodeling Company in the Reorganization of its Company and Affiliates

Provided Counsel to a Client on the Acquisition of a Multi-Unit Commercial Property Involving a Commercial Condominium, Tenants in a Common Interest and 1031 Exchange

Counseled a University on Unrelated Business Taxable Income Considerations

Acted as General Counsel for a Contract School for Seven Years

Represented Two Home Remodeling Companies in Two Separate Transactions for the Sale of their Nearly \$50 Million Business

Provided Counsel to an Organization on the Ground Lease Structure and Eventual Sale of its Multi-Family Apartment Condominium Complex

Counseled-Tax Sensitive Investors in Joint Ventures Unrelated Taxable Income Matters

Assisted with the Multi-Million Dollar Sale of an Electronics Manufacturing Company

Assisted a Popular Local Restaurant in Restructuring to Separate Out Different Streams of Business

Assisted an Entertainment & Recreation Business in the Sale of Their Local Franchise

Assisted in the Asset Sale of a Multi-Million Dollar Local Business

Corporate & Securities

Raymond J. Melton
Partner

Steven E. Miller
Partner

Maddie Owen
Paralegal

Vic Peterson
Partner

Ann M. Rieger
Partner

Emilie Rohde
Associate

Sara M. Rose
Associate

Allen M. Salomon
Partner

Thomas P. Scherschel
Partner

Gregory J. Sell
Partner

John H. Shore
Partner

Steven K. Sims
Partner

Ryan M. Spott
Partner

Daniel Spungen
Senior Counsel

John W. Tanselle
Partner

Debra Theine
Paralegal

Karen A. Tobin
Partner

Larry Tomlin
Partner

Represents a Nonprofit Lender Working in Partnership with Area Banks and Other Nonprofit Lenders to Provide Low-Interest Loans to Businesses in Wisconsin

Advises an Agribusiness Lender on Waste Disposal Revenue Bond Letters of Credit and Creditors' Rights Issues

Represented an Agribusiness Lender in a \$27 Million Waste Disposal Revenue Bonds Project

Represented an Agribusiness Lender in a \$10 Million Waste Disposal Revenue Bonds Project to its Borrower

Represented the Shareholders of a Risk Management Information System Provider for Health Care Organizations in the Sale of Their Business

Serves as Outside General Counsel to a National and International Leading Manufacturer and Distributor of Medical Equipment

Advise a Life Science Client with Respect to Manufacturing and Supply-Side Agreements

Represented an Electronic Discovery and Digital Forensics Company in its Sale to a Private Equity Backed Platform

Assisted a Client Involved in Engineering, Designing and Manufacturing Electrical Control Panels in its Sale of Equity to a Portfolio Company

Prosecuted Individual Shareholder's Breach of Fiduciary Duty and Minority Oppression Claims to Judgment

Represents a Privately Held Construction and Leasing Company in Daily Corporate Legal Needs

Defended a Trust in a Breach of Fiduciary Duty and Breach of Confidentiality Agreement Involving a Closely Held LLC

Represented a Designer and Manufacturer in the Sale of its Equity to a Private Equity Firm

Assisted with the Sale of a Logistics Provider

Assisted a Private Equity Firm with the Purchase of a Strategic Engineering and Design Service Supplier

Assisted a Specialty Insurance Service Provider with the Sale of the Business to a Portfolio Company

Assisted a Public Company in the Purchase of a Material Handling Supplier

Corporate & Securities

Adrian T. Ulatowski
Of Counsel

Michael Van Someren
Partner

Brittany Wilson
Paralegal

Emma Zhang
Associate

Danielle M. Zimmerman
Paralegal

AREAS OF CONCENTRATION

Commercial Contracts
Corporate Governance
Insurance Transactions
Joint Ventures & Strategic Alliance Agreements
Mergers & Acquisitions
Money Management/
Investment Adviser
Outside General Counsel
Securities & Capital Markets
Securities Enforcement
Shareholder Activism
Venture Capital & Private Equity

Represented a Direct Marketing Company in a \$50 Million Cash-Out Merger and Sale to a Private-Equity Backed Competitor

Acts As Outside Securities and M&A Counsel to a Publicly Traded Electronics Company

Represented Manufacturing Company in Connection With the Sale of the Company's Assets

Serves as Chief Legal Advisor to an Integrated Steel Processor and Framing Products Manufacturer

Assisted a Custom Manufacturer and Distributor in the Sale of the Company to a Canadian-Based Metal Distributor

Firm News

Congratulations to the Amundsen Davis Attorneys Included on the 2024 Indiana Super Lawyers and Rising Stars Lists
Firm News, February 28, 2024

Amundsen Davis Promotes 10 Attorneys to Partner
Firm News, February 21, 2024

Amundsen Davis Named in the 2024 Edition of Best Law Firms®
Firm News, November 2, 2023

92 Amundsen Davis Attorneys Recognized by Best Lawyers® in 2024 in America
Firm News, August 17, 2023

Amundsen Davis Welcomes Emilie Smith to Corporate & Securities Service Group
Firm News, July 17, 2023

Attorney Alice Lin Joins Amundsen Davis's Chicago Office
Firm News, July 10, 2023

Tim Feldhausen Receives the Outstanding Eagle Scout Award from the Bay-Lakes Council and the Boy Scouts of America
Firm News, April 18, 2023

Amundsen Davis Promotes Three Attorneys to Partner
Firm News, February 21, 2023

U.S. News & World Report – Best Lawyers® “Best Law Firms” 2023
Firm News, November 3, 2022

41 Amundsen Davis Attorneys Recognized by *Best Lawyers in America*© 2023
Firm News, August 18, 2022

Corporate & Securities

Attorney Emma Zhang Joins Amundsen Davis's Corporate & Securities Service Group
Firm News, May 31, 2022

Amundsen Davis Promotes Five Attorneys to Partner
Firm News, March 14, 2022

30 Amundsen Davis Attorneys Included on 2022 Illinois Super Lawyers and Rising Stars Lists
January 28, 2022

U.S. News & World Report – Best Lawyers® “Best Law Firms” 2022
November 4, 2021

Amundsen Davis Welcomes Daniel Spungen as Senior Counsel in Indianapolis
October 20, 2021

34 Amundsen Davis Attorneys Recognized by *Best Lawyers in America*© 2022
August 19, 2021

27 Amundsen Davis Attorneys Included on 2021 Illinois Super Lawyers and Rising Stars Lists
January 29, 2021

U.S. News & World Report – Best Lawyers® “Best Law Firms” 2021
November 5, 2020

Attorney Steven Sims Joins Amundsen Davis's Corporate Practice Group
January 2, 2020

U.S. News & World Report – Best Lawyers® “Best Law Firms” 2020
November 1, 2019

19 Amundsen Davis Attorneys Named to *Best Lawyers in America*© 2020
August 15, 2019

U.S. News & World Report – Best Lawyers® “Best Law Firms” 2019
November 1, 2018

Amundsen Davis Ranks on Crain's Chicago Business' 2018 Largest Law Firms List
Crain's Chicago Business, October 25, 2018

15 Amundsen Davis Attorneys Included in *Best Lawyers in America*© 2019
August 15, 2018

Amundsen Davis's St. Louis Office Expands

John Tanselle Honored as Distinguished Fellow by the Indianapolis Bar Foundation
November 21, 2017

Corporate & Securities

Amundsen Davis Ranks on Crain's Chicago Business' Largest Law Firms List
Crain's Chicago Business, September 15, 2017

12 Amundsen Davis Attorneys Included in Best Lawyers in America© 2018
August 15, 2017

Amundsen Davis Selected as Outside General Counsel to the Better Business
Bureau of Chicago and Northern Illinois
Firm News, October 27, 2016

8 Attorneys Join Our Indianapolis Office
Firm News, September 2016

Amundsen Davis Ranks on Crain's Chicago Business' Chicago Largest Law Firms
List
Firm News, *Crain's Chicago Business*, September 10, 2016

Stephen Stitle Honored as 2016 Laureate by Junior Achievement of Central
Indiana's Business Hall of Fame
Junior Achievement of Central Indiana, February 25, 2016

In the Media

Karen Tobin Quoted in Cook County Record – Illinois law reducing LLC fees will
help make Prairie State a bit more business friendly
Media Mention, *Cook County Record*, January 30, 2018

Alerts

BlockFi Settlement: A New Era in Crypto Regulation?
Article, *Amundsen Davis Financial Services and Corporate Alert*, February 24, 2022

Corporate Transparency Act and its Impact on Your Business
Article, August 18, 2021

Don't Let Your Supply Chain Run Aground
Article, April 15, 2021

Ripple Effect: SEC Lawsuit against Cryptocurrency Company May Provide
Guidance for Crypto Industry
Amundsen Davis Corporate and Cryptocurrency, Blockchain and FinTech Alert, March
11, 2021

Federal Beneficial Ownership Reporting Requirements Coming Soon for Many
Corporations and LLCs
Amundsen Davis Corporate Alert, March 9, 2021

Corporate &
Securities

SEC Promotes Capital Formation and Expands Investment Opportunities with Amendments to Accredited Investor Definition
Amundsen Davis Corporate Alert, January 25, 2021

IRS Expands the IP PIN Opt-In Program: A Key to Protect Your Identity
Amundsen Davis Corporate Alert, January 15, 2021

Year-End Corporate Tax Considerations: The Essentials
Article, December 3, 2020

Companies Should Not Overlook the Importance of Their Contract Terms and Conditions
Article, November 16, 2020

SBA Releases Revised and EZ Forms For PPP Loan Forgiveness Application: What's New, What Changed and What Stayed the Same
Article, June 2020

CARES Act Provides Tax Incentives for Charitable Giving in 2020
Amundsen Davis Corporate Alert, May 19, 2020

SBA Releases PPP Loan Forgiveness Application and Instructions: Lays Out Calculation Process and Clarifies Some Open Questions
Article, May 16, 2020

Businesses Must Be Aware of Local Safer At Home Orders, Including Those in Brown, Dane, Kenosha, and Rock Counties, Parts of Milwaukee County, and the Cities of Appleton, Madison, Milwaukee, and Racine
Article, May 14, 2020

SBA Creates New Safe Harbor for PPP Certification Review: Loans Under \$2 Million Deemed Certified in Good Faith and Loans Over \$2 Million Subject to Possible Loss of Forgiveness (Updated May 14, 2020: New PPP FAQ #47 published)
Article, May 13, 2020

Governor Evers "Turns the Dial" to Begin Further Relaxing Restrictions on Businesses Categorized by the State as Non-Essential Retail
Article, May 11, 2020

Limited Safe Harbor May 14 Deadline Looms: Did I Misunderstand or Misapply the PPP Borrower Certification?
Article, May 5, 2020

Breaking News: SBA Extends PPP Safe Harbor Repayment Deadline to May 14: Promises Additional Guidance on Certification Review
Article, May 5, 2020

Post COVID-19 Return to Work
Article, April 28, 2020

Strategies for Landlords in Dealing with Tenants in Light of COVID-19
Article, April 20, 2020

The Rise of Real Estate Funds – How Real Estate Investors Can Efficiently Raise
Capital to Facilitate Development and Acquisitions
Article, April 20, 2020

Executive Order 2020-14: Temporarily Erasing the In Person Requirement for
Notarization
Amundsen Davis Financial Services Alert, April 17, 2020

Save Small Business Fund: Provides Grants to the Smallest of Small Businesses,
Opens April 20
Article, April 17, 2020

To Keep Your Real Estate Deals Moving, Consider a Pause Provision
Article, April 16, 2020

Wisconsin Offers Legal Protection for Those Manufacturing Emergency Medical
Supplies
Article, April 16, 2020

Wisconsin's New Safer At Home Order Alters Restrictions on Businesses
Article, April 16, 2020

Hoarding and Price Gouging: Antitrust Concerns amid COVID-19
Amundsen Davis Corporate Alert, April 9, 2020

The United States Patent and Trademark Office Finally Weighs in on the CARES
Act Allowing Waiver of Patent-Related and Trademark-Related Timing Deadlines
Article, April 1, 2020

Coronavirus Aid, Relief, and Economic Security Act (CARES): Title IV – Assistance
to Severely Distressed Sectors of the United States Economy
Article, March 26, 2020

CARES Act Passed Providing Forgivable Loans to Maintain Business Continuity in
Trying Times (Updated March 27, 2020)
Article, March 26, 2020

Old Fashioned to Go? Alcohol Beverages May Be Ordered on a Carry-Out Basis
During the COVID-19 Pandemic
Article, March 26, 2020

Guidance for Businesses Resolving Multiple “Shelter in Place” Orders and
Differing Definitions of “Essential Business”
Article, March 25, 2020

Are You an “Essential Business” in Wisconsin Under the Safer At Home Order?
Article, March 24, 2020

THE TIME IS NOW – Telemedicine on the Frontlines
Amundsen Davis Health Care and Corporate Alert, March 24, 2020

Practical Technology Considerations for Employers Implementing Work at Home
Article, March 23, 2020

Guidance to Manufacturers in Managing Operations during the COVID-19 Crisis
Article, March 23, 2020

Borrowers Under SBA 504 and SBA 7(a) Loan Programs Eligible for Deferral of
Principal, Interest and Fees for up to Six Months
Article, March 20, 2020

Employer Relief May Be in Sight – Senate Bill Includes Forgivable Loans to
Maintain Payroll for Next Four Months
Article, March 20, 2020

Wisconsin Acts to Secure State and Federal Assistance for Small Businesses
Affected by COVID-19
Article, March 18, 2020

COVID-19 Impact: Considerations for Business Shutdown Preparation
Article, March 17, 2020

Secretary Azar Waives Certain HIPAA Sanctions and Penalties Against Covered
Hospitals
Article, March 17, 2020

Impact of COVID-19 on Supply Chain Contracts and Responding to Force Majeure
Claims
Article, March 13, 2020

Remote Online Notarization Becomes Law
Article, March 3, 2020

Anticipatory Breach of Contracts May Become More Common in a Time of
Uncertainty
Article, February 25, 2020

The Foreign Corrupt Practices Act: SEC Enforcement and Lessons in Corporate
Compliance
Amundsen Davis Corporate & Securities Alert, February 24, 2020

Tax and Retirement Planning: The SECURE Act in 2020
Amundsen Davis Corporate Alert, January 20, 2020

Swap New Year's Resolutions for Real Property with a 1031 Tax-Deferred Exchange
Article, January 17, 2020

Be Careful What You Wish For: A Harsh Lesson in Contractual Notices
Amundsen Davis Corporate Alert, January 8, 2020

More Accredited Investors? SEC Contemplates Expanding the Pool of Individuals That May Invest In Private Placements
Article, January 8, 2020

Stage Is Set for Significant Retirement Bill to Pass by Year End (SECURE Act)
Article, December 18, 2019

Preserving a Seller's Attorney-Client Privilege Post-Closing
Amundsen Davis Corporate and Financial Services Alert, August 30, 2019

Monitor Your Business Liens
Amundsen Davis Corporate Alert, April 19, 2019

Be Wary of Speculative CDS Bets and Manufactured Defaults
Amundsen Davis Corporate Alert, April 4, 2019

Public Companies May Now Offer Securities Under Regulation A+
Amundsen Davis Corporate Alert, February 11, 2019

Requesting an Exclusion from U.S. Tariffs on Chinese Products - Deadline October 9
Amundsen Davis Corporate Alert, October 4, 2018

Structuring Around Stockholders' Appraisal Rights in a Merger
Amundsen Davis Corporate Alert, August 6, 2018

Beware of the New General Data Protection Regulation: Is Your Business Collecting Personal Data from EU Citizens?
Amundsen Davis Corporate Alert, June 22, 2018

Navigating Withdrawal Procedures in Multiple Jurisdictions
Amundsen Davis Corporate Alert, May 22, 2018

Business Succession Opportunities after Tax Reform
Amundsen Davis Corporate Alert, March 2, 2018

Regulation A+ Securities Offerings – Comparison with Alternatives and Recent Developments
Amundsen Davis Corporate Alert, January 30, 2018

Purchasing LLC Membership Interests vs. Real Estate: Pros and Cons
Article, December 6, 2017

Wisconsin Creates a New Type of For-Profit Business Entity: "Benefit Corporations"

Article, November 30, 2017

New Partnership Audit Rules for 2018

Article, November 6, 2017

IRS Announces 2018 Estate and Gift Tax Limits

Article, November 6, 2017

Using Your "Disadvantaged Business" to Your Advantage

Article, October 26, 2017

Modern Commercial Financing: Your Guide to Regulation A+

Article, September 25, 2017

Life After LIBOR

Article, August 24, 2017

Supply Chain: Are Your Standard Terms and Conditions Up-to-Date?

Article, August 1, 2017

Supreme Court Decides That the First Amendment Trumps the Denial of Protection for "Disparaging" Trademarks

Article, June 27, 2017

Is Now the Right Time to Get Your Company Ready to Sell?

Article, June 12, 2017

Estate Planning for Your Digital Property

Article, June 2, 2017

"Bailing In" to Avoid a Bail Out: How new legislation is putting your money at risk

Article, May 31, 2017

Regulation A+: An Alternative to Private Placements and Initial Public Offerings

Article, May 4, 2017

Google Mandates Play Store and In-App Privacy Policies

Article, March 28, 2017

CAM Reconciliation: Landlord Considerations for Common Area Maintenance Fee Provisions

Article, February 16, 2017

Alternative Financing Strategies in a World of Rising Interest Rates

Article, February 16, 2017

Wisconsin's Rental Unit Weatherization Standards

Article, February 16, 2017

Events

Managing New Legal Mandates for Multi-State Employers
Event, Amundsen Davis, Webcast, June 11, 2024

Illinois Chamber of Commerce: Tips to Sell Your Business in the New Year
Speaking Engagement, Webcast, February 29, 2024

Tips for Selling Your Business in the New Year
Event, Amundsen Davis, Webcast, February 15, 2024

Corporate Transparency Act - Everything You Need to Know For 2024
Event, Amundsen Davis; Webcast, December 20, 2023

The Most Valuable Asset: Overcoming Employee Related Hurdles to Close a Deal
Speaking Engagement, Midwest Business Brokers and Intermediaries, Seminar;
Fishers, IN, August 24, 2023

Survive and Thrive: What Businesses Must Do Now to Brace for a Recession
Event, Amundsen Davis, Webcast, July 13, 2023

Corporate Governance: From Nuts and Bolts to Trending Topics
Speaking Engagement, Illinois Chamber of Commerce, Webcast, September 21,
2022

A Trending Tool in Making M&A Faster and Less Risky: Reps and Warranty
Insurance
Speaking Engagement, Association of Corporate Counsel's Annual Conference;
Las Vegas, NV, May 19, 2022

L&E Legal Updates + Business Succession Planning
Independent Pharmacy Cooperative Conference 2022, Seminar; San Diego, CA,
April 14, 2022

Business Insurance: Maximizing Coverage and Mitigating Risks | Tools to Guide
Your Purchasers and Your Legal Team
Speaking Engagement, Association of Corporate Counsel Wisconsin Annual
Conference, Seminar; Elkhart Lake, WI, November 4, 2021

Illinois Marijuana Business Law 2021 – Section III: Business Financing & Product
Packaging
National Business Institute, Webcast, July 28, 2021

Key Components of an Effective Buy-Sell-Agreement
Speaking Engagement, Exit Planning Institute, Webcast, May 27, 2021

Thinking About Selling Your Business? What You Need to be Doing Now
Event, Amundsen Davis, Webcast, May 12, 2021

Corporate & Securities

Mergers & Acquisitions Steps to Success
Speaking Engagement, Webcast, April 28, 2021

Racine & Kenosha Counties – The Bridge to Wisconsin's Future
Speaking Engagement, BizTimes Media, Webcast, April 22, 2021

Playbook for Recovery' Series – Business & Community Development Training
Camp
Speaking Engagement, New North Summit, Webcast, April 14, 2021

More Regulation and Opportunities for Companies and Banking: What
Businesses Can Expect from the Biden Administration
Event, Amundsen Davis, Webcast, March 31, 2021

Pandemic Problems: Prominent Legal Issues and Trends in a COVID-19 World
Speaking Engagement, Wisconsin Institute of Certified Public Accountants 2020
Accounting and Auditing Conference, Livestream, November 18, 2020

Everything You Need to Know About LLCs - Including Important Recent
Developments
Better Business Bureau, Webcast, November 12, 2020

Core Principles for Privacy Policies
Speaking Engagement, Milwaukee Business Journal's Family-Owned Business
Virtual Event, Webcast, October 9, 2020

Website Privacy Policies: Do you really need to care (Hint – Probably)?
Speaking Engagement, Association of Corporate Counsel Wisconsin Chapter
2020 Annual Virtual Conference, Webcast, August 25, 2020

Identifying Key Liability Risks in the Workplace and Among Your Workforce
Speaking Engagement, WI Veterans Chamber, Seminar, July 24, 2020

It's Time To Thrive – Getting Your Business Back On Track in 2020
Speaking Engagement, BizTimes Media's Family & Closely Held Business Summit
2020, Webcast, July 22, 2020

Identifying Key Liability Risks in the Workplace and Among Your Workforce
Speaking Engagement, BizTimes Media, Webcast, June 30, 2020

PPP Flexibility Act of 2020: What Are Your Options Now?
Speaking Engagement, First Midwest Bank, Sikich LLP and BT360, Webcast, June
16, 2020

Litigation Concerns Spike as the State Opens
Speaking Engagement, Green Bay Packers Mentor-Protégé Program, Webcast,
June 9, 2020

Returning to Work: What will business look like after COVID-19?
Speaking Engagement, Creative Business Interiors and The Horton Group,
Webcast, June 4, 2020

Re-Opening the Economy --- Preparing to Return Workers to the Workplace
Speaking Engagement, Illinois Chamber of Commerce, Webcast, May 15, 2020

You've Decided to Keep Your PPP Funds, Now What? Properly Prepare to
Maximize Loan Forgiveness
Speaking Engagement, BizTimes Media, Webcast, May 5, 2020

You Received Your PPP Loan or Your Application is in Process: *What You Must Do
Now*
Event, Amundsen Davis, Webcast, April 28, 2020

Critical Legalese for Start-ups: Organization, Agreements and IP
Irontek, Webcast, April 28, 2020

COVID Era and Beyond: Managing Workforce Liability Under a New Normal
Speaking Engagement, BizTimes Media, Webcast, April 23, 2020

Understanding the CARES Act
Speaking Engagement, BizTimes Media, Webcast, April 8, 2020

Paycheck Protection Program: Factors for Considering a Loan
Event, Webcast, April 2, 2020

Managing Your Workforce in the #SaferAtHome Era
Event, Amundsen Davis, Webcast, March 30, 2020

Speakers from Practice: Practicing Sports Law
Speaking Engagement, Marquette University's National Sports Law Institute and
Sports Law Society, Seminar; Milwaukee, WI, February 27, 2020

Milwaukee Business Journal - Downtown CEO Roundtable
Event, Milwaukee Business Journal's Downtown CEO Roundtable, Seminar;
Milwaukee, WI, January 28, 2020

Monetizing Your Facilities — Whether Expanding, Moving or Remaining As-Is
Speaking Engagement, Appleton, WI, October 24, 2019

Next Generation Manufacturing Summit 2019
Speaking Engagement, Wisconsin Exposition Center; West Allis, WI, October 9,
2019

Preserving the Family Legacy Through Estate Planning
Speaking Engagement, Italian Community Center; Milwaukee, WI, June 13, 2019

The Nuts & Bolts of Contract Drafting and Risk Management
Speaking Engagement, The Osthoff Resort; Elkhart Lake, WI, May 16, 2019

Giftng Techniques Using Trusts and The Use of Family Limited Partnerships/LLCs
in Estate Planning

Speaking Engagement, Radisson Milwaukee West Hotel; Milwaukee, WI, February
28, 2019

Subcontracts: the Good, the Bad, and the Ugly

Speaking Engagement, The Ingleside Hotel; Pewaukee, WI, February 14, 2019

Reconciling State and Federal Audits After New IRS Partnership Audit
Regulations: Tax Reporting Challenges

Speaking Engagement, Strafford; Webcast, November 13, 2018

New Partnership Representative Final Regulations Under Section 6223
Centralized Audit Regime

Speaking Engagement, Strafford; Webcast, October 25, 2018

The Corporate Paralegal from A to Z

Speaking Engagement, National Business Institute, Webcast, September 26, 2018

Family & Closely Held Business Summit 2018

Event, BizTimes Media; Milwaukee, WI, June 14, 2018

Estate Planning and New IRS Centralized Partnership Audit Rules: Impact on
Trusts Holding Partnership Interest

Event, Stafford; Webcast, May 30, 2018

10 Pearls of Wisdom on Negotiating Contracts

Event, Association of Corporate Counsel Wisconsin Chapter 2018 Annual
Conference; Elkhart Lake, WI, May 17, 2018

Foxconn: Get In On the Ground Floor

Event, The Daily Reporter; Webcast, April 26, 2018

Old National Bank Commercial Real Estate Forum

Event, Pritzlaff Event Center; Milwaukee, WI, April 25, 2018

Legal Audits for Business and Employment Issues

Event, Emmons Business Interiors; Milwaukee, WI, March 22, 2018

How to Redevelop Milwaukee: Essential Elements of the Deal

Event, Pritzlaff; Milwaukee, WI, March 22, 2018

The Corporate Paralegal: Overcoming Top Challenges

Speaking Engagement, Institute for Paralegal Education; Webinar, March 8, 2018

CLE and Reception at Lodge Kohler

Event, Lodge Kohler; Green Bay, WI, February 28, 2018

The Impact of Regulation A+ on Real Estate Development

Event, Lorman; Webcast, February 26, 2018

Step-by-Step Estate Planning II
Event, State Bar of Wisconsin Seminar Series; Milwaukee, WI, February 23, 2018

Directives from the Board Room: Will Your HR Team Fail or Save the Day?
Amundsen Davis, Webcast; Chicago, IL, February 21, 2018

What Does Tax Reform Mean for You and Your Business?
Event, Northern Trust Economic Trends 2018; Milwaukee, WI, January 19, 2018

Developments in Dealmaking and Proposed Regulation, and the Impact on M&A
Association for Corporate Growth; Webinar, October 11, 2017

2017 Business Law Legislative Update
Indianapolis Bar Association; Indianapolis, IN, June 27, 2017

Gifting Techniques Using Trusts and The Use of Family Limited Partnerships/LLCs
in Estate Planning
Speaking Engagement, State Bar Center; Madison, WI, February 23, 2017

Amundsen Davis and Chicago Taiwanese American Professionals Present Panel
on Business Startups
Amundsen Davis, Taiwanese American Professionals, Seminar; Chicago, IL,
November 17, 2016

Regulation A+ Innovative Alternatives to Private Equities and PIPEs
Amundsen Davis and Dresner Corporate Services, Chicago, Seminar, May 25,
2016

2016 JOBS Act Updates: Critical Changes in Capital Formation Rules
Illinois State Bar Association's Business and Securities Law Section, Chicago, IL,
May 25, 2016

Published Works

Ripple Effect: SEC Lawsuit Against Cryptocurrency Company May Provide
Guidance For Crypto Industry
USLAW Magazine, June 21, 2021

State of Illinois Force Majeure Law Compendium (during COVID-19 pandemic)
USLAW, June 5, 2020

State of Indiana Force Majeure Law Compendium (during COVID-19 pandemic)
USLAW, June 5, 2020

Is Fair Disclosure 'Fair' in European Cross-Border M&A Deals?
USLAW Magazine, March 22, 2018

Guidance for Attorneys in Dealing with Cybersecurity Risks
Illinois State Bar Association's Business & Securities Law Forum, July 2016

Blog Posts

U.S. Supreme Court: "Pure" Omissions Are Not Actionable Under Rule 10b-5
Corporate News: A Legal Update, April 16, 2024

Impact of the SEC's 2024 Examination Priorities Report for Investment Advisers
Corporate News: A Legal Update, March 21, 2024

U.S. District Court Rules the Corporate Transparency Act Unconstitutional: What is the Impact for Businesses?
Corporate News: A Legal Update, March 4, 2024

Enhancing Transparency in Real Estate: FinCEN's New Reporting Requirements for Non-Financed Transfers
Corporate News: A Legal Update, February 8, 2024

Pros and Cons of Online Templates and Examples
Corporate News: A Legal Update, February 6, 2024

What the Corporate Transparency Act Means for Financial Institutions
Corporate News: A Legal Update, October 25, 2023

FinCEN to Extend Initial Reporting Deadline for the Corporate Transparency Act
Corporate News: A Legal Update, September 28, 2023

Wisconsin Personal Property Tax Repealed: What it Means for Business Owners
Corporate News: A Legal Update, September 27, 2023

Is Nothing Sacred? Cyberattacks May Impact Director and Officer Fiduciary Duties
Corporate News: A Legal Update, September 20, 2023

What the Show *Succession* Teaches Us About Planning for a Family Business
Corporate News: A Legal Update, September 7, 2023

Five Tips for Business Owners When Selling
Corporate News: A Legal Update, September 5, 2023

Federal Antitrust Agencies Propose New Guidelines for Review of M&A Transactions
Corporate News: A Legal Update, August 3, 2023

U.S. Supreme Court Opens Door for Companies to Face Lawsuits in Any State They Are Registered to Do Business
Corporate News: A Legal Update, July 10, 2023

Calming Depositor Angst at Community Banks
Corporate News: A Legal Update, April 17, 2023

Corporate & Securities

New Guidance on the Beneficial Ownership Information Reporting Rule
Corporate News: A Legal Update, April 3, 2023

FTC Announces Increases to Hart-Scott-Rodino Act Notification Thresholds and Filing Fees
Corporate News: A Legal Update, February 16, 2023

Forever Chemicals (PFAS) in Real Estate Transactions: Avoiding Forever Consequences
Corporate News: A Legal Update, February 8, 2023

Private Placement – State and Federal Law Considerations
Corporate News: A Legal Update, February 1, 2023

Patience is a Virtue: Landmark Federal M&A Broker Exemption Effective March 29, 2023
Corporate News: A Legal Update, January 19, 2023

Opt In/Out Deadline for New Wisconsin LLC Law is December 31, 2022
Corporate News: A Legal Update, December 8, 2022

Tick Tock: Election to Opt-Out of Wisconsin's New "Creditor-Friendly" LP And LLC Acts Expire December 31, 2022
Corporate News: A Legal Update, November 30, 2022

What the SEC's New Strategic Plan Means for the Financial Industry and Investors
Corporate News: A Legal Update, September 7, 2022

Contract Drafting During Historic Inflation Increases
Corporate News: A Legal Update, April 15, 2022

The Potential Impact of the Climate Risk Disclosure Act
Corporate News: A Legal Update, March 24, 2022

Proposed Amendment to Illinois Law Could Impact Corporate Pocketbooks
Labor & Employment Law Update, March 23, 2022

Corporate &
Securities