

Charles G. Maris

Brookfield, WI

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PARTNER

Overview

Charlie handles estate planning for individuals, including the preparation of wills, trusts, marital property agreements and powers of attorney; the implementation of gifting strategies; trust and will administration; and the preparation of gift and estate tax returns. His clients include individuals and small family-owned businesses regarding real estate transactions and general business matters.

His 35+ years of experience, and licenses in both Wisconsin and Florida, allows him to advise on a wide array of estate planning matters including trust, estate and real estate matters that occur in both states.

Experience

Represented a Closely Held Family Business Design, Implement and Update their Business Succession Plan

Established a Custodial Trust for a Minor Beneficiary of a Significant Personal Injury Settlement

Obtained a Favorable Settlement on Behalf of a Corporate Trustee Following the Unauthorized Transfer of Assets from the Trust

Membership & Involvement

- Herbert Mueller Society Member: Greater Milwaukee Foundation
- Scholarship Committee Member: American Hellenic Educational Progressive Association-Milwaukee
- Past President: Waukesha Estate Planning Council
- Past Board of Directors: Association for the Rights of Citizens with handicaps (ARCh)
- Past President, Current Member: Peace Lutheran Church New Berlin

SERVICES

Trusts, Estates & Succession Planning

EDUCATION

Marquette University Law School, J.D., *cum laude*

University of Wisconsin - Milwaukee, B.B.A., *magna cum laude*

ADMISSIONS

Wisconsin

Florida

- Member: The Florida Bar; State Bar of Wisconsin; Waukesha Estate Planning Council; Waukesha County Bar Association; Milwaukee Estate Planning Forum

Honors

- Selected to *The Best Lawyers in America*® in Trusts and Estates: 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024
- Selected to *The Best Lawyers in America*® in Nonprofit/Charities Law: 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024
- Selected to Best Lawyers® in Nonprofit/Charities "Lawyer of the Year" in Milwaukee: 2020
- Selected to the Wisconsin Super Lawyers list: 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023

Firm News

Amundsen Davis Attorneys Included in 2023 Wisconsin Super Lawyers and Rising Stars Lists!

Firm News, November 16, 2023

91 Amundsen Davis Attorneys Recognized by Best Lawyers® in 2024 in America

Firm News, August 17, 2023

Amundsen Davis Attorneys Included in the 2022 Wisconsin Super Lawyers and Rising Stars List

Firm News, *Amundsen Davis*, November 15, 2022

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