

# Jacqueline L. Messler

Brookfield, WI

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## PARTNER

### Overview

Jackie's clients appreciate her ability to explain sophisticated concepts during times that are often stressful. It's her patience and attention to detail that are most notable when working with clients in estate and business succession planning, marital property agreements, pre and post-nuptial agreements, guardianships, probate, and trust administration.

As a partner in the firm's Trust, Estates and Succession Planning Service Group, Jackie regularly advises clients, particularly high net worth individuals, on all aspects of estate planning, including wills, revocable trusts, powers of attorney, irrevocable life insurance trusts, and generation-skipping transfer trusts. She brings a breadth of experience to negotiating settlement agreements in a contentious administration which allow for efficient estate settlements.

Jackie has extensive experience in advising clients in probate and trust administration after the death of a loved one. She also assists clients in special needs planning, including creating trusts under WisPact and Life Navigators. As an animal lover herself, Jackie also advises clients on the best way to take care of pets after an owner's incapacity or death, including drafting pet trusts.

Jackie also counsels business owners in ongoing business operations and succession planning. This includes the preparation of organizational documents, including the Articles of Incorporation and Operating Agreement, buy-sell and transfer restriction agreements, the negotiation and preparation of various other corporate agreements, as well as legal services related to ongoing business operations, and the documents necessary to ensure the successful transition of the ownership and management of the businesses.

Additionally, Jackie also advises clients on pre-nuptial and post-nuptial agreements, including provisions relating to keeping individual property (including business interests), maintenance, provisions for divorce, and provisions for death. She also has experience representing clients petitioning for a guardianship, including petitioning for guardianship over a minor child,

### SERVICES

Trusts, Estates & Succession Planning

### EDUCATION

Marquette University Law School, J.D., 2012, *cum laude*

Carroll University, B.A., *magna cum laude*

### ADMISSIONS

Wisconsin

petitioning for guardianship for a disabled child turning 18, and petitioning for guardianship over an incompetent adult.

### Membership & Involvement

- Member: Waukesha County Estate Planning Council; Carroll Community Council
- Herbert Mueller Society Member: Greater Milwaukee Foundation
- Volunteer: Wills for Heroes

### Honors

- Selected to National Law Review's Go-To Thought Leader in Tax Law: 2021
- Selected to the Wisconsin Super Lawyers "Rising Stars" list: 2019, 2020, 2021, 2022
- Selected to Wisconsin Law Journal Up and Coming Lawyer: 2016
- Selected to *The Best Lawyers in America*® in Trusts and Estates: 2020, 2021, 2022, 2023, 2024
- Selected to *The Best Lawyers in America*® in Tax Law: 2024

### Firm News

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

### In the Media

Jacqueline Messler Discusses Updates to Transfer-on-Death Documents

### Alerts

The IRS Extends Time to Make Portability Election

Act Now – Estate Tax Planning Under the Biden Administration

IRS Issues Additional Guidance for Retirement Account Withdrawals in 2020

IRS Clarifies Stimulus Checks Sent to Deceased Taxpayers Must Be Returned

Estate Planning For Your Pets

IRS Announces 2018 Estate and Gift Tax Limits

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Estate Planning for Your Digital Property

### Speaking Engagements

Spots on the X-Ray: Identifying Ways to Add Value to Clients  
Speaking Engagement, Milwaukee, WI, May 15, 2024

Proposed Wealth Tax Changes Under the Biden Administration  
Speaking Engagement, BizTimes, Family & Closely Held Business Summit;  
Brookfield, WI, June 29, 2021

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

Estate Planning for Your Animal-Loving Clients  
Speaking Engagement, Association for Women Lawyers, January 16, 2019

Succession Planning: Continuing Your Legacy  
Speaking Engagement, Association of General Contractors (AGC) of Greater  
Milwaukee; Milwaukee, WI, November 15, 2018

Family & Closely Held Business Summit 2018  
Event, BizTimes Media; Milwaukee, WI, June 14, 2018

Family & Closely Held Business Summit 2017  
Speaking Engagement, Potawatomi Hotel & Casino; Milwaukee, WI, July 12, 2017

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