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**PROFESSION:** "AV" Attorney (highest national rating by Martindale-Hubbell); Masters in Taxation; National Academy of Elder Law Attorneys; WealthCounsel member; WealthCounsel Advisors; Wisconsin Real Estate Broker.

**HONORS:** Milwaukee Magazine 2010 FIVE STAR Wealth Manager. This elite group represents the top six percent of estate planners in the Milwaukee area.

Herbert J. Mueller Society of the Greater Milwaukee Foundation.

**BAR MEMBERSHIP:** United States Supreme Court; United States Tax Court; United States Court of Appeals - Seventh Circuit; United States District Court (Eastern and Western District, Wisconsin); Wisconsin Supreme Court; American Bar Association; Wisconsin Bar Association; Waukesha County Bar Association.

**WORK EXPERIENCE:**

1983-Present **Swendson/Fey Law Ltd.**, an "AV" (Superior national rating by Martindale-Hubbell) law firm at Avenue Square Mall, 175 East Wisconsin Avenue, Oconomowoc, Wisconsin 53066-0123.

Areas of Practice:

- A. Estate Planning including personalized plans for people of all walks of life that work to: protect families; protect assets; avoid tax; avoid probate; reflect clients' unique hopes, dreams, values, and goals; promote family harmony.
- B. Probate and Trust Administration including federal and state estate tax returns, federal and state fiduciary income tax returns, probate and trust litigation including will contests.
- C. Elder Law including Medicare, Medicaid & Title XIX planning; guardianships, conservatorship & protective placement; nursing home & long-term care planning; divestment & "spend down" planning; asset protection, preservation & distribution; social security and other disability programs; accessing medical records; appealing health insurance denials; long-term care insurance; working with care facilities & assistance dealing with abuse, neglect & exploitation of senior citizens; viatical settlements; reverse mortgages; getting credit after age 62; transferring property outside probate; daily money management; assistance remedying and preventing financial abuse & consumer fraud against senior citizens; accommodating the elderly in court; age discrimination; retirement rights; senior citizen housing issues; prescriptive drug issues.
- D. Income, Estate and Gift Tax preparation, planning, audits, litigation and appeals for individuals, partnerships, corporations, trusts and real estate.

- E. Business and Corporate including organizing, planning, compliance and operation, qualified and unqualified fringe benefits and deferred compensation, and litigation matters for corporations, general partnerships, limited partnerships, limited liability companies (LLC) and limited liability partnerships (LLP).
- F. Real Estate including sales, purchases, tax-deferred exchanges, commercial and residential development, condominiums, homeowner's associations, financing, tax planning, environmental problems, easements, workouts, foreclosures and litigation related to real estate matters.
- G. Trials and Appeals related to real estate matters, and probate and trust litigation including will contests.
- H. Family and Divorce including child custody and placement, property division, alimony and child support, paternity and the modification or enforcement of current orders.

1974-1982                      Johnson, Brendemuehl, Swendson & Georgeson, 150 East Wisconsin Avenue, Oconomowoc, Wisconsin 53066.

1973-1974                      Arthur, Tomlinson, Gillman & Travers, S.C., 330 East Wilson Street, Madison, Wisconsin 53703.

**LEGAL EDUCATION:**                      University of Wisconsin  
Degree: JD (1973)  
Honors: National Science Foundation Fellow (1971)

**TAX EDUCATION:**                      University of Wisconsin-Milwaukee  
Degree: Masters in Taxation - Accounting (1989)

**TRIAL ADVOCACY EDUCATION:**  
The National Institute for Trial Advocacy, Mid-America Regional,  
University of Kansas School of Law (1989)

**UNDERGRADUATE EDUCATION:**  
Lawrence University, Appleton, Wisconsin  
Degree: BA (Economics; 1970)  
Honors: Newberry Library Fellow (1969)

**ACTIVITIES:**                      St. Vincent de Paul (2010-present); Village of Lac La Belle President (2009-2011); Village of Lac La Belle Planning Commission (1988-2011); Village of Lac La Belle Extraterritorial Zoning Committee (2009-2011); Village of Lac La Belle Trustee (2007-2009); Pro Bono Legal Advisor to Holy Hill (1994-present); Pro Bono Legal Counsel for St. Jerome Catholic Church (1998 to present); Trustee of St. Jerome Catholic Church (1998 to 2003); Office of Lawyer Regulation District 6 Investigative Committee (January, 2003-present); Legal Advisors of Sister House for Battered Women (1982-2000); Board of Advisors of Tax News (1983-1996); University of Wisconsin-Milwaukee Tax Association (1984-1994); Board of Directors for Town & Country YMCA (1989-1994); Faculty member of Real Estate Institute (1986-

1992); Oconomowoc Soccer Association Board of Directors/Secretary (1995-1998); Oconomowoc Rotary Club (1978-1994); Corporate and Finance Committee Member of Memorial Hospital at Oconomowoc, Inc. (1990-1993); Oconomowoc School Board (1980-1986); School Board Treasurer (1983-1986); Board of Directors of the Northwest Unit of the American Cancer Society-Legacy Chairperson (1984-1988); United Way (Vice-Chairperson-1984; Chairperson-1985); Pro Bono Legal Counsel and Board of Directors (Secretary), Oconomowoc Rotary Foundation (1982-1984); Clerk/Treasurer-Village of Lac LaBelle (1981-1983); Secretary-Joint Sewer Committee for Town of Oconomowoc, Village of Lac LaBelle, Town of Ixonia Sanitary District #2 (1978-1983); Board of Advisors, Oconomowoc Nursery School (1974-1982); Board of Directors, Oconomowoc Chamber of Commerce (1981-1983); Board of Directors, Waukesha County Bar Association (1982-1984).

- SEMINARS PRESENTED:** “Estate Planning” sponsored by the United Church of Christ (Spring, 2007)
- “Basic Estate Planning” sponsored by Oconomowoc Memorial Hospital Foundation (Fall, 2004)
- “Estate Tax Reform??? Uncertainty in an Area Requiring Certainty” sponsored by Oconomowoc Memorial Hospital Foundation (Fall, 2001)
- “Advanced Estate Planning” sponsored by Oconomowoc Memorial Hospital Foundation (Spring, 2001)
- “Basic Estate Planning” sponsored by Oconomowoc Memorial Hospital Foundation (1999, 2000)
- “Basic Estate Planning” sponsored by Prudential Insurance (1999)
- “End of Life Planning: Uses of Durable Powers of Attorney “ given for St. Jerome Catholic Church, Oconomowoc, Wisconsin (1999)
- “Planning for Distributions from Qualified Retirement Plans” given for Rock River Financial Planning Association (1999)
- “New Choices for IRAs after the Taxpayer Relief Act of 1997” given for M & I Lake Country Bank and First Bank Oconomowoc (1998)
- “Roth IRA: Six Secrets for Building Financial Independence” sponsored by Baird (1998)
- "Basic Estate Planning" sponsored by the First Congregational Church UCC (1995).
- "Use of Trusts" sponsored by Paine Webber (July, 1990 and February, 1991).
- "Modern Real Estate Practice"-16 session, lecture series sponsored by the Real Estate Institute (1986-1992).

"Wisconsin Uniform Marital Property Act for CPAs" co-sponsored by the Wisconsin Institute of Certified Public Accountants and Professional Education Systems Inc. (August, 1986).

"Estate planning for the terminally ill and disabled" sponsored by the American Cancer Society (annually 1983-1987).

"Income Tax and Negotiating Considerations of Structured Settlements" sponsored by Oberweis Securities (December, 1984).

**PUBLICATIONS:**

"Wisconsin's Attempts to Extend the Sales and Use Tax to Services: Florida Revisited", Journal of State Taxation, Volume 8, Number 3, (Fall, 1989).

"Use of Disclaimers in Post Mortem Estate Planning", University of Wisconsin-Milwaukee Estate Planning Symposium (January, 1985).