



Linda M. Danielson

Family Business & Succession Planning, Tax and Estate Planning, Fiduciary Services and Business Transactions

Linda practices in the areas of tax and estate planning and business law. In her estate planning practice, she helps clients to develop and implement estate plans that accomplish their nontax objectives, taking into consideration the uniqueness of their personal relationships, the types of assets they own, their philosophy on how the wealth they have accumulated during their lifetimes should be distributed upon their deaths, and other relevant factors.

A substantial part of her estate planning practice involves helping clients to minimize gift and estate taxes. Her estate planning practice includes:

- Setting up estate plans to avoid probate through the use of trusts, marital property agreements, titling, and beneficiary designations.
- Setting up estate plans that maximize the federal and state estate tax and generation skipping transfer tax exemption amounts.
- Drafting and implementing irrevocable life insurance trusts, qualified personal residence trusts (QPRTs), grantor retained annuity trusts (GRATs), and other techniques to reduce estate taxes.
- Advising clients on how to take advantage of valuation discounts in making lifetime gifts.
- Drafting prenuptial agreements, special needs trusts, and other specialized estate planning documents.
- Linda's business law practice includes:
- Determining which type of entity a client should use in setting up a new business and helping the client set up that entity.
- Drafting employment agreements, deferred compensation agreements, buy-sell agreements, and other contracts.
- Business succession planning.
- Assisting clients who are buying and selling closely held businesses.

Education:

University of Wisconsin – Stevens Point (1984)

J.D., University of Wisconsin – Madison (1988)

Admitted to Practice:

Wisconsin Supreme Court

U.S. District Court for the Western District of Wisconsin

Bar Associations:

American Bar Association

State Bar of Wisconsin

Member: Business Law Section, Elder Law Section, Real Property Section, Taxation
Section

Eau Claire County Bar Association

Speaking Engagements:

"Essentials of Reviewing, Preparing, and Understanding Contracts", Western Dairyland
Women's Business Conference

Civic Activities:

United Cerebral Palsy of West Central Wisconsin, Inc., Board Member (1996 – present)

Chippewa Valley Symphony Foundation, Advisor

Eau Claire YMCA, Board Member

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