

# James F. Daly

## *Retired Partner*

With 40 years of experience as a trusts & estates attorney, James Daly has served a variety of clients for 30 years and longer — in a few cases, he has been a trusted advisor to three generations of family members, helping them transfer both business and private assets seamlessly, usually avoiding probate but generally eliminating delays of all kinds. His practice included a special emphasis on estate planning for business owners, executives and professionals, marital property planning, gift planning, estate and trust administration, and taxation. Jim took care of every detail involving the transfer of wealth from one party to another, in an atmosphere of respect and trust.

Jim valued the close relationships that he has developed with his many clients. One advantage of such close interaction is that he could more clearly understand each client's financial goals, better advise them on how to manage their assets, and offer advice that most advantageously affects their decisions about the disposition of their assets. His goal was to structure an estate plan that is as simple and efficient as possible in accomplishing each client's objectives.

## **Education and Honors**

- University of Wisconsin Law School (J.D., 1974)
  - Order of the Coif, Editor, Wisconsin Law Review, 1973-1974
- University of Wisconsin (B.S., 1971)

## **Court Admissions**

- U.S. Tax Court, 1978
- U.S. District Court, Eastern District of Wisconsin, 1974

## **Professional and Civic Activities**

- State Bar of Wisconsin (Member, Real Property, Probate and Trust Law, Taxation, and Elder Law Sections)
- American Bar Association (Member, Real Property, Probate and Trust Law, and Taxation Sections)
- Milwaukee Bar Association (Member)
- Milwaukee Kiwanis Club (Member, School Mentoring Committee)
- Mitchell Integrated Arts School (4th-Grade Tutor)

## **Professional Recognition**

- Named a 2009 FIVE STAR: Best in Client Satisfaction Wealth Manager<sup>SM</sup> (2011-2013)
- Selected for inclusion in the 2005-2016 Wisconsin Super Lawyers<sup>®</sup>



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## **Milwaukee Office**

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lists (Estate Planning & Probate)

- Martindale-Hubbell AV® Peer Review Rated
- Listed in The Best Lawyers in America® (2007-present: Trusts and Estates)