John T. Bannen

Retired Partner

John Bannen was a partner in the firm's Estate, Trust & Wealth Preservation Group. His practice focused on estate planning and probate matters for individuals, small business owners, and professionals; marital property issues and agreements; reviewed evaluation of life insurance and annuity products; split dollar arrangements and related life insurance premiums for business owners; counseled small employers on pension and profit-sharing alternatives; and distribution strategies for accumulations of retirement income. He represented clients in estate tax audits, pension and profit sharing audits, and probate court and administrative practice. His special experience included:

- Intergenerational family wealth protection; drafted wills and trusts to minimize the effect of taxes and to minimize the risk of creditors' claims, and division of assets in the event of divorce.
- Planned for retirement, including distribution strategies for maximum income tax savings for retirement income, including pension, profit-sharing and 401(k) plans, and IRAs; planned for long-term care expenses and consideration of home care and nursing home insurance.
- Planned to simplify the passage of property to spouses and children upon death, focused on avoidance of probate.
- Independent and unbiased review of life insurance and annuity needs and products; consideration of life insurance-based tax strategies and planning.
- Settled disputes among family members relating to wills, trusts, or probate or trust administration.

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Education and Honors

- University of Wisconsin-Milwaukee (M.A.F.L.L., 2011)
- University of Wisconsin-Milwaukee (B.A., 2003)
- DePaul University College of Law (LL.M., 1989)
- Marquette University Law School (J.D., 1976)
- University of St. Thomas (B.A., 1973)

Bar Admissions

- Wisconsin

Court Admissions

- U.S. Tax Court, 1983
- U.S. District Court, Eastern District of Wisconsin, 1979
- U.S. District Court, Western District of Wisconsin, 1979

- U.S. Court of Federal Claims

Professional and Civic Activities

- Milwaukee Bar Association (Chairman, Legal Services For the Elderly Committee, 1984–1986; Chairman, Probate, Practice and Procedure, 1987–1988)
- American Bar Association (Taxation and Real Property, Probate and Trust Sections)
- State Bar of Wisconsin (Director, Real Property, Probate and Trust Law Sections 1990–1993)
- Taxation Section, Inter-Professional Relations Accountants' Committee, Member (1976–1980)
- Wisconsin Society of Chartered Life Underwriters (Director 1996–1998)
- American Society of Chartered Life Underwriters (CLU)
- Associate Member Association for Advanced Life Underwriters (AALU) (1999–2015)
- Wisconsin Retirement Plan Professionals, Ltd. (Director, 1987–1990)
- Fellow, American College of Trust and Estate Counsel (ACTEC), (1990–present)
- Trustee, ACTEC Foundation (2012–2017)
- ACTEC Wisconsin State Laws Coordinator (1992–1995)
- ACTEC Committee Chair Employee Benefits in Estate Planning (2002–2005)
- ACTEC Wisconsin State Chair (2007–2013)
- Greater Milwaukee Employee Benefits Council
- Estate Administration Section of General Practice program, University of Wisconsin Law School, Instructor, 1981
- Planned Giving Committee, Next Door Foundation, Inc., Member
- Planned Giving Committee, School Sisters of Notre Dame, Member
- School Sisters of Notre Dame Advisory Counsel, President (1995–1998)
- Westwind Greens Owners Association, Director (1991–1995)
- St. Michael's Cemetery Association, Secretary
- Sisters of St. Francis of Assisi Ongoing Community Support Plan, Trustee (1995–2005)
- Servants of Mary Continuing Care Charitable Trust, Trustee (2003–2005)
- Wauwatosa Knights of Columbus Foundation, Inc., Trustee (1982–1999)
- Society of the Divine Savior Ongoing Support Trust, Trustee (2004–2005)
- Christ King Parish Community, Trustee and Treasurer (1995–1998)
- Planned Giving Committee Milwaukee Zoological Society, Member

Professional Recognition

- Ranked Band 1 in *Chambers HNW* (2018: Private Wealth Law)
- State Bar of Wisconsin – Pro Bono Honor Society (2013, 2015-2020)
- Named the Best Lawyers® 2010, 2019 Milwaukee Trusts & Estates "Lawyer of the Year"
- Selected as Five Star Wealth Manager (2010–2020)
- Selected for inclusion in the 2005–2019 Wisconsin Super Lawyers® lists (Estate Planning & Probate)
- Listed in *The Best Lawyers in America*® (1995–2022: Trusts and Estates)
- Martindale-Hubbell AV® Peer Review Rated
- Board Certified Estate Planning Law Specialist as accredited by American Bar Association
- Chartered Life Underwriter
- Michael Gonring Pro Bono Team of the Year Award (2019)

Languages

- Spanish