John T. Bannen

Partner

John Bannen's practice focuses on estate planning and probate matters for individuals, small business owners, and professionals; marital property issues and agreements; review and evaluation of life insurance and annuity products; split dollar arrangements and related life insurance premiums for business owners; counseling small employers on pension and profit-sharing alternatives, and distribution strategies for accumulations of retirement income. He represents clients in estate tax audits, pension and profit sharing audits, and probate court and administrative practice. His special experience includes:

- Intergenerational family wealth protection; drafting 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.
- Planning for retirement, including distribution strategies for maximum income tax savings for retirement income, including pension, profit-sharing and 401(k) plans, and IRAs; planning for long-term care expenses and consideration of home care and nursing home insurance.
- Planning to simplify the passage of property to spouses and children upon death, focusing 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.
- Settling disputes among family members relating to wills, trusts, or probate or trust administration.

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Legal Services

- Estate, Trust & Wealth Preservation
- Employee Benefits

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–present)
- Wisconsin Retirement Plan Professionals, Ltd. (Director, 1987–1990)
- Fellow, American College of Trust and Estate Counsel (ACTEC), (1990–present)
- Trustee, ACTEC Foundation (2012–present)
- 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)
- Named the Best Lawyers® 2010, 2019 Milwaukee Trusts & Estates "Lawyer of the Year"
- Selected as Five Star Wealth Manager (2010–present)
- Selected for inclusion in the 2005–2019 Wisconsin Super Lawyers® lists (Estate Planning & Probate)
- Listed in *The Best Lawyers in America*® (1995–present: Trusts and Estates)
- Martindale-Hubbell AV® Peer Review Rated
- Board Certified Estate Planning Law Specialist as accredited by American Bar Association
- Chartered Life Underwriter

Languages

- Spanish