

Kristin A. Occhetti

Partner

Kristin Occhetti's practice focuses on estate planning and wealth transfer and preservation strategies for individuals, executives, business owners, and professionals. She is particularly knowledgeable in preparing estate plans for individuals with disabled beneficiaries and potential guardianship needs; representing personal representatives, trustees, and beneficiaries in complex probate and trust administrations; and finding creative ways to reform outdated or impractical irrevocable trusts while keeping the donor's original intent intact. Kristin's compassionate and detailed approach to estate planning and trust and estate administration matters brings her clients and their families peace of mind during what can be an emotionally stressful time.

Kristin is also a valuable member of the firm's Fiduciary Litigation Subgroup, representing a variety of parties in trust and estate disputes including, without limitation, claims of breach of fiduciary duty, undue influence and lack of testamentary capacity, and finding successful ways to settle the same without going to trial. Her practice further includes:

- Preparing estate plans for high net-worth individuals, consisting of wills, trusts, marital property agreements, financial powers of attorney, and health care powers of attorney
- Counseling corporate and individual trustees and personal representatives of their fiduciary duties, and beneficiaries of their rights, in trust and estate administrations
- Preparing federal estate tax returns and defending the same against IRS audits
- Counseling individuals on charitable giving matters and preparing gifting vehicles to carry out the same

Kristin resides in Mequon with her husband and three children.

Legal Services

- [Estate, Trust & Wealth Preservation](#)
- [Fiduciary, Trust and Probate Litigation](#)
- [Financial Institutions Litigation](#)

Education and Honors

- Marquette University Law School (J.D., *cum laude*, 2007)
 - Dean's List; CALI Award: Legal Writing and Research I, Probate Practice and Procedure
 - Alpha Sigma Nu; Marquette Law Review (Associate Editor, 2006–2007)



kristin.occhetti@quarles.com

Milwaukee Office

Tel: (414) 277-3075

Fax: (414) 978-8763

- Intern to the Honorable Patience Drake Roggensack, Wisconsin Supreme Court
- Thomas Moore Law Scholarship; Herbert C. Hirschboeck Law Scholarship; Justinian Society of Lawyers Scholarship
- University of Michigan (B.A., 2003)
 - Majors: Anthropology and Zoology

Bar Admissions

- Wisconsin

Professional and Civic Activities

- Legal Aid Society of Milwaukee (Board Member)
- Adjunct Professor, Marquette University Law School (Probate Practice and Procedure)
- Life Navigators (Trust Committee)
- Zoological Society of Milwaukee (Associate Board)
- American Bar Association (Member)
- Wisconsin Bar Association (Member)
- Milwaukee Bar Association (Member)
- Association of Women Lawyers (Member)
- Justinian Society of Lawyers (Member)
- Children's Hospital Guardianship Pro Bono Clinic (Former Co-chair)
- Quarles Cares (Former Milwaukee Office Chair)

Professional Recognition

- Listed in *The Best Lawyers in America*® (2020: Trusts and Estates)
- Recipient of the 2013 Howard B. Eisenberg Service Award from Marquette University Law School
- Selected for inclusion in Wisconsin Super Lawyers® -Rising Stars 2011–2020 Editions (Estate Planning & Probate)

Selected Presentations/Publications

- Featured, "Volunteer Spotlight," Messenger, Milwaukee Bar Association publication, Winter 2009–2010