Amalia Todryk

PARTNER
Milwaukee and Madison Chair,
Estate, Trust & Wealth Preservation
Practice Group

Milwaukee
t. (414) 277-3041
amalia.todryk@quarles.com

About Amalia

Trusted advisor to affluent families, successful business owners and corporate executives

Amalia is a trust and estate lawyer who advises wealthy families, owners and operators of closely held/family businesses, executives of large private and public companies, professionals and trustees. She focuses on:

- **Estate and retirement planning**
- **Business succession planning**
- **Estate and trust administration**, including probate
- **Leveraged gift techniques**
- **Federal and state tax return preparation**
- **Charitable planning and giving**

Clients appreciate Amalia's responsiveness, discretion and practical approach. She is a trusted advisor to her clients, their families and businesses. Amalia strives to provide them with guidance and peace of mind during what often involves their most difficult decisions and life events. One of Amalia's favorite aspects of her work is truly getting to know her clients, their values, asset composition and businesses so she can work with them to develop creative and custom estate and business succession plans. Amalia's ability to connect with her clients and their families allows her to navigate multi-generational and inter-family dynamics in a thoughtful and caring manner. The majority of Amalia's new clients are from referrals by existing clients and their advisors.

Education and Honors

Marquette University Law School (J.D., 2003)

- CALI Excellence for the Future Award
- Federal Taxation of Corporations & Shareholders
- St. Thomas More Scholarship Awarded for all three years

University of Michigan (B.A., 2000)

- Member of the Varsity Women's Cross Country and Track teams
- Big Ten Academic All American (1996–1997)

Bar Admissions

Wisconsin

Quarles

Amalia Todryk is the chair of the firm's Wisconsin Estate, Trust & Wealth Preservation Group.

Experience in Action

- **Creating tax-efficient estate plans** and preparing wills, trusts, marital agreements and powers of attorney to implement them.
- **Counseling on succession planning for owners of family and closely held businesses**, advising on ownership structures designed to facilitate gift and estate planning transfers, and developing pre-sale tax strategies for business owners.
- **Implementing sophisticated gift, estate and generation-skipping transfer tax planning techniques** to minimize the impact of taxes on intergenerational transfers of wealth.
- **Administering estates and trusts and advising personal representatives and trustees** on fiduciary duties, income tax and accounting matters.
- **Preparing and defending on audit federal and state estate tax**, gift tax and fiduciary income tax returns.
- **Acting as trustee of irrevocable trusts.**
- **Advising and implementing charitable planning techniques**.

Recent Success

- Helped scores of families structure personal assets and businesses to achieve personal and financial goals and minimize taxes.
- Developed and implemented gifting programs to transfer S Corporation stock via annual exclusion gifts, installment sales to intentionally “defective” grantor trusts and grantor retained annuity trusts in order to reduce estate tax liability. Gifting programs have ranged in size from $15 million to hundreds of millions of dollars.
- Worked with businesses with net worths of $10 million to over $1 billion, the ownership of which is held across multiple generations. Developed and implemented sophisticated leveraged gifting programs for both first- and second-generation owners to transfer significant ownership interests in business to the next generation to reduce estate tax exposure while maintaining post-retirement income for the senior generations and helping to ensure the future viability of the business.
- Implemented multiple dynasty trusts to control family wealth distribution, including unique assets, for future generations.
- Successfully represented numerous personal representatives and trustees in IRS audits of complex, high-dollar estate tax returns.
- Negotiated and prepared complex gift agreements for lifetime and post-death charitable gifts.

Capabilities

Estate, Trust & Wealth Preservation

Business Law

Business Succession Planning

Charitable Planning

Professional Recognitions

- Named *Best Lawyers*® 2018, 2021 Milwaukee Closely Held Companies and Family Businesses Law "Lawyer of the Year"
- Selected for inclusion in *Best Lawyers*® 2016-present (Closely Held Companies and Family Businesses Law, Tax Law, and Trusts and Estates)
- Selected as a Rad Milwaukee Woman by the Women's Fund of Greater Milwaukee (2016)
- Selected for inclusion in Wisconsin Super Lawyers®–Rising Stars Editions 2010–2011 (Estate Planning & Probate)
- Selected as 1 of 26 "Up and Coming Lawyers" in Wisconsin by the Wisconsin Law Journal (2010)

Professional & Civic Activities

- Milwaukee Bar Association, Trusts & Estate Section (Vice Chair, September 2015 - June 2016)
- Milwaukee Bar Association, Trusts & Estate Section (Program Chair, September 2014 - June 2015)
- Milwaukee Bar Association, Trusts & Estate Section (Chair, September 2013 - June 2014)
- American Bar Association (Member)
- Wisconsin Bar Association (Member)
- Milwaukee Estate Planning Forum, Ltd. (Member)
- Medical College of Wisconsin Cancer Center Philanthropic Board (Board Member)
- Professional Dimensions (Member)
- Junior League of Milwaukee (Member)
- The Service Club of Milwaukee (Member)
- Wisconsin Humane Society (Former Board of Directors)
- United Way Planned Giving Advisory Committee (Former Member)