

## Katherine Hanes

### ASSOCIATE

Milwaukee

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## About Katie

### Developing and administering estates and trusts

Katie Hanes works with clients to develop estate plans and prenuptial agreements and administer estates and trusts. She prepares estate planning documents that carry out a client's wishes while minimizing taxes and administrative burdens. Katie also works with corporate and individual trustees and personal representatives to effectively and efficiently administer trusts and estates.

Katie understands that knowing your family situation is crucial to developing an estate plan that accomplishes your goals. She asks directed questions and provides options to clients to help them navigate the complex job of creating an estate plan. Katie also knows how challenging it can be to begin to administer a trust or estate and provides structure and support to get the job done.

### Experience in Action

- **Prepares core estate planning documents such as revocable trusts, wills, powers of attorney and marital property agreements.** Katie prepares these essential documents to help avoid a probate proceeding at death and ensure assets pass to beneficiaries in a safe and financially secure manner.
- **Prepares irrevocable trusts** that allow families and individuals to transfer wealth in a tax-efficient way.
- **Prepares estate and gift tax returns.**
- **Administers trusts and estates.** Katie works with trustees and personal representatives to aggregate assets, work through the court system if necessary, prepare returns and pay final taxes, and distribute trust or estate assets.

### Education and Honors

UC Berkeley School of Law  
(J.D., 2017)

- *Berkeley Journal of Criminal Law* (Editor-in-Chief)
- Berkeley Law Foundation (Member)

University of Wisconsin -  
Madison (B.A., 2013)

- Women's Varsity Rowing Team

### Bar Admissions

Wisconsin





## Capabilities

Estate, Trust & Wealth Preservation

Business Succession Planning

Charitable Planning

## Professional & Civic Activities

- Milwaukee Bar Association, Trusts & Estates Section, Program Co-Chair
- Greater Milwaukee Foundation - Young Professional Advisors, Member
- Association for Women Lawyers, Member
- Children's Hospital Guardianship Pro Bono Clinic, Volunteer

