FOLEY & LARDNER LLP

Stephanie J Derks

Associate

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Stephanie Derks concentrates her practice on estate planning for high-net-worth individuals, family business succession planning, family office formation, trust and estate administration, tax compliance, and other wealth planning matters. Stephanie understands the unique dynamics involved when working with families and individuals. She strives to provide creative and comprehensive solutions to achieve clients' estate, business, and tax planning goals. She is a member of the firm's Estates and Trusts Practice.

Representative Experience

- Achieved client's goal of generational family ownership of closely held business through utilizing creative trust ownership structure.
- Applied advanced estate and tax planning techniques to allow for the gradual transition of the closely held business to the next generation while ensuring the current generation's financial security and the company's long-term sustainability.
- Implemented estate planning methods, such as irrevocable trusts, GRATs, and installment sales, to transfer wealth to different family members while minimizing tax implications.
- Played an integral role in creating a family office and continued to work with the family office to implement creative tax-saving solutions.
- Administered large estates with complex assets and tax issues and advised family members through the estate administration process.
- Worked with businesses and other organizations to apply innovative special-purpose trusts.

Awards and Recognition

- Received, Best Lawyers: Ones to Watch recognition for:
- Corporate Law (2022)
- Trusts and Estates (2021-2024)

Community Involvement

- Participant in the 2019 -2020 Young Professional Adviser Council (YPA) with the Greater Milwaukee Foundation.
- Board Member, Curative Care Network, Inc.
- Volunteer, Wills for Heroes

Presentations and Publications

- Presenter, “Charitable Gifts of Special Assets,” Planned Giving Council Series (Fall 2019; Fall 2020; Fall 2021, Spring 2022)

Sectors

- Family Offices
- Manufacturing

Practice Areas

- Corporate
- Estate Planning

Education

- University of Wisconsin Law School (J.D., cum laude, 2015)
  - Managing Editor, *Wisconsin Law Review*
- University of Wisconsin-Madison (B.A., 2011)
  - Certificate in European studies

Admissions

- Wisconsin