H. Wes Taylor

Partner

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Wes Taylor advises individuals and families on estate planning, business and wealth succession planning, tax-minimizing planning, disposition and management of sensitive assets, charitable planning, the creation and administration of family foundations, special-needs trust planning, trust and estate administration, and beneficiary mediation. He enjoys working with families to develop effective, customized, and streamlined plans that meet individualized goals, are optimized to provide maximum flexibility, and provide peace of mind. Wes is a partner in the firm's Estate Planning Practice.

Wes is a Chartered Advisor in Philanthropy and assists clients with legacy and succession planning, blending tax-sensitive strategies with clients' philanthropic goals to achieve positive results for the client, their family, and the community.

Prior to law school, Wes worked at the University of Wisconsin Survey Center and the Wisconsin Department of Natural Resources. He also worked as a software producer, directing, producing, and managing commercial software titles. As a college senior, he assisted in reintroducing the peregrine falcon to Virginia's Blue Ridge Mountains.

Representative Experience

- Provide ongoing counsel to family managing US$100m in family trusts and closely held family entities.
- Administer US$60m estate, navigate buy-out of US$25m stake in closely held business.
- Draft tax-minimizing estate plan for US$35m estate, establishing private foundation and dynastic trusts for children and grandchildren.
- Provide counsel to family on ongoing management of closely held business.
- Mediate beneficiary dispute to resolve disagreements among children arising from administration of parent's estate.
- Draft dynastic tax-minimizing business succession trusts for primary shareholders of US$100m closely held business.

- Implement comprehensive tax-minimizing estate and wealth-succession plan encompassing US$15m in personal real estate and other investments.
- Secure US$7m estate tax refund following protracted IRS audit which reached the Joint Committee on Taxation of the U.S. Congress.

Awards and Recognition

- Recipient, Dane County Bar Association Pro Bono Publico Individual Award (2012)
- Recipient, Chief's Award from the University of Wisconsin Police Department (2011)

Affiliations

- Member, Madison Estate Council
- Member, Wisconsin Planned Giving Council
- Director, Courtier Foundation
- Chartered Advisor in Philanthropy

Community Involvement

Wes has worked as a pro bono attorney for the AARP Tax-Aide and for Volunteer Income Tax Assistance (VITA). He is the former Wills for Heroes coordinator for southern Wisconsin, organizing and attending clinics for first responders since 2010 in Dane and surrounding counties.

Presentations and Publications

- "Recent Developments in Estate Planning," Wisconsin State Bar, November 2022
- "Recent Developments in Estate Planning," Wisconsin State Bar, November 2021
- "Recent Developments in Estate Planning," Wisconsin State Bar, November 2020
- "Recent Developments," Wisconsin State Bar, November 2019
- "Recent Developments in Estate Planning," Madison Estate Council, November 2018
- "Recent Developments," Wisconsin State Bar, November 2018
- "Your Land, Your Legacy," UW Extension, May 2018
- "Recent Developments," Wisconsin State Bar, November 2017
- "Recent Developments," Wisconsin State Bar, November 2016
- "Qualified Personal Residence Trusts," Top Estate Planning Techniques, October 2016
- "Irrevocable Life Insurance Trusts," Top Estate Planning Techniques, October 2016
- "Grantor Trusts," Top Estate Planning Techniques, October 2016
- "Annual Exclusion Gifting," Top Estate Planning Techniques, October 2016
- "Grantor Trusts," Estate Planning from A to Z, May 2016
- "Trusts Used for Tax Reduction," Estate Planning from A to Z, May 2016
- "Documenting Long-Term Care, Incapacity and End-of-Life Decisions," Estate Planning from A to Z, May 2016
- "Key Elements of Effective Wills," Estate Planning from A to Z, May 2016
- "ILITs" March 2016

- "Trust Decanting Principles" February 2016
- "Annual Exclusion Gifting," Top Estate Planning Techniques, December 2015
- "Revocable Living Trust Planning vs. Will-Based Estate Planning," December 2015
- "Raising the Bar on Alzheimer's: Shades of Gray for the Legal Profession," October 2015
- "Trust Management and Investment Provisions," Grantor Trusts from A to Z, September 2015
- "Drafting Trust Distribution Provisions," Grantor Trusts from A to Z, September 2015
- "Grantor Trusts, Recent Developments," Grantor Trusts from A to Z, September 2015
- "Select Philanthropic Tools and Strategies," Driftless Area Land Conservancy, July 2015
- "Will Drafting, Drafting Effective Wills and Trusts," June 2015
- "Wisconsin's Trust Code, Drafting Effective Wills and Trusts," June 2015
- "Drafting Trusts for Tax Reduction," Estate Planning from A to Z, June 2015
- "Grantor Trusts," Estate Planning from A to Z, June 2015
- "Qualified Personal Residence Trusts," Top Estate Planning Techniques, March 2015
- "Irrevocable Life Insurance Trusts," Top Estate Planning Techniques, March 2015
- "Grantor Trusts, Top Estate Planning Techniques," March 2015
- "Annual Exclusion Gifting, Top Estate Planning Techniques," March 2015
- "Grantor Trusts," Top Estate Planning Techniques, December 2015
- "Irrevocable Life Insurance Trusts," Top Estate Planning Techniques, December 2015
- "Qualified Personal Residence Trusts," Top Estate Planning Techniques, December 2015
- "Summary of Wisconsin Trust Code," Capital Wealth Advisory Group, October 2014
- State Bar of Wisconsin Annual Estate Planning Seminar: Recent Developments, 2010 – 2014
- "Grantor Trusts," Estate Planning from A to Z, November 2014
- "Drafting Trusts for Tax Reduction," Estate Planning from A to Z, November 2014
- "Trust Decanting," Forum for Women Estate Counselors, September 2014
- "Decanting and other Methods of Trust Administration," Rules of Trust Administration in Wisconsin, September 2014
- "Conservation Easement Planning," Driftless Area Land Conservancy, September 2013
- "Putting Your Affairs In Order – Disability and Estate Planning," UW Hospital and Clinics, October 2012
- "Charitable Gifts of Retirement Plan Assets," Community Foundation of Southern Wisconsin, October 2012
- "Pro Bono Opportunities," Foley & Lardner LLP, June 2012
- "Putting Your Affairs In Order – Disability and Estate Planning," UW Hospital and Clinics, January 2012

Teaching

Wes has been an adjunct professor at the University of Wisconsin Law School since 2018 where he teaches Federal Estate and Gift Tax.

Sectors

- Health Care & Life Sciences
- Manufacturing

- Racial Justice & Equity

Practice Areas

- Corporate
- Estate Planning

Education

- University of Wisconsin Law School (J.D., 2009)
  - Concentration in estate planning with honors
  - Worked with Professor Howie Erlanger to develop an estate planning concentration for the law school
  - Served as a judicial intern to Wisconsin Supreme Court Justice David T. Prosser
- Yale School of Forestry and Environmental Studies (M.S., 1991)
- The College of William and Mary (B.S., with honors, 1989)
  - Member, Phi Beta Kappa

Admissions

- Wisconsin
- U.S. District Court for the Western District of Wisconsin