



## KELLY M. SPOTT

# O'NEIL CANNON

HOLLMAN DEJONG & LAING S.C.

### Shareholder

#### CONTACT

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#### PRACTICE GROUP

- Business
- Tax Advice, Planning & Controversy
- Trust, Estates & Succession Planning
- Inheritance Litigation & Will Contest

Kelly leads O'Neil Cannon's Trust, Estates and Succession Planning Group. She assists clients with estate planning, succession planning, probate administration, trust administration, and inheritance litigation. She is licensed to practice law in both Wisconsin and Florida.

Kelly enjoys working with families and believes in educating her clients on how their estate plan will work while they are alive, what happens in an emergency, and what happens upon the loss of a loved one. She believes that a good estate plan will help ease potential family tensions and stress upon the loss of a loved one.

Kelly grew up working on her family's dairy farm and her mother's family's 3rd generation machine shop. She watched many business decisions being made at the kitchen table and understands how family dynamics are inseparable from the family business. She appreciates the ingenuity, perseverance, and dedication required of business owners to grow and expand their businesses.

#### Kelly Assists Clients With

- Estate Planning for Families
  - Wills for Young Families
  - Revocable Trusts
  - Testamentary Trusts
- Reviewing and Amending Existing Estate Plans
- Maximizing Tax Efficiencies for Beneficiaries
- Transferring Wealth to the Next Generation
- Powers of Attorney
- Avoiding Probate
- Funding Revocable Trusts to Avoid Probate
- Structuring IRA and 401(k) Beneficiary Designations
- Helping Manage a Deceased Loved One's Affairs
  - Trust Administrations
  - Probate Administrations
  - Non-probate transfers
- Inheritance Litigation Matters
  - Will Contests
  - Undue Influence Cases
  - Trustee Disputes
  - Probate Disputes
  - Fiduciary Controversies

**Experience/Representative Client Work**

- Advanced Planning Attorney, Northwestern Mutual, 2016–2017
- Associate Attorney, Mawicke & Goisman, S.C., 2013–2016
- Clerk, Waukesha County Probate Registrar, 2013

**Professional Associations & Affiliations**

- Member, State Bar of Wisconsin
- Member, Society of Financial Service Professionals
- Board Member, Society of Financial Service Professionals
- Member, Professional Dimensions

**Awards/Distinctions**

- Martindale-Hubbell® Peer Review Rating™–AV, reflecting an attorney who has reached the height of professional excellence and is recognized for the highest levels of skill and integrity
- Selected for inclusion on *The Best Lawyers in America: Ones to Watch* list, 2021–2024
- Selected for inclusion in 2022 and 2023 Wisconsin Super Lawyers Rising Stars, *Law & Politics and Milwaukee Magazine*
- Dean’s List, Marquette University
- Member, Alpha Sigma Nu–Jesuit Honor Society
- Member, Sigma Delta Pi–National Collegiate Hispanic Honor Society
- CALI Award–Real Estate & Finance Development, 2012

**Articles/Presentations**

- Eckhardt’s Workbook for WI Estate Planners, “Planning for Nonprobate Transfers,” March 2019

**Community Involvement**

- Member, Soles for Catholic Education Walk committee

**Education**

- Marquette University Law School (J.D.)
- Marquette University (B.S.)