O'NEIL CANNON
HOLLMAN DEJONG & LAING S.C.

CARL D. HOLBORN

Shareholder

CONTACT
Tel | 414.276.5000
carl.holborn@wilaw.com

PRACTICE GROUP

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

Whether he is working with clients to create and administer an estate plan, solving complicated business problems, negotiating with the IRS, or helping to transition a family owned business to the next generation, Carl prides himself on being a trusted advisor to his clients. With a Master's Degree in Taxation, Carl possesses unique skills to assist his clients in solving legal issues in a tax efficient manner. A clear thinker and easy to talk to, Carl distills complex legal issues into understandable ones that allow his clients to make effective decisions. Carl's clients are individuals and businesses in a wide variety of occupations and industries that value a trusted advisor as their lawyer.

Carl Assists Clients With

- Structuring estate plans for affluent individuals and families to maximize wealth preservation from one generation to the next
- Representation for corporate and individual fiduciaries, as well as beneficiaries in probate and trust administration matters
- Business succession planning
- Representation of taxpayers in dealing with tax controversies involving state and federal taxing authorities
- Planning and structuring charitable donations for both individuals and charitable organizations

Experience/Representative Client Work

- Preparation and implementation of estate plan for clients with net worth in excess of $75 million
- Successful preparation and implementation of complex estate plan for client with real estate holdings worth in excess of $25 million
- Represented a charity in an estate dispute, preserving the full charitable distribution indicated in the original trust documents, an amount which was over $1 million more than the trustee intended to distribute
- Probate administration of deceased owner of manufacturing firm with a net worth in excess of $7 million
- Preserved a client's family farm valued at more than $3 million through successful representation during an estate dispute
- Negotiated with Internal Revenue Service in a dispute involving complex estate tax issues

Awards/Distinctions

- Martindale-Hubbell® Peer Review Rating™–AV Preeminent, reflecting an attorney who has reached the height of professional excellence and is recognized for the highest levels of skill and integrity

- Rated a 10.0 out of 10.0 by Avvo, a national attorney rating service which uses a mathematical model to rate attorneys based on experience, professional achievements, industry recognition, and professional conduct
- Selected for inclusion in *The Best Lawyers in America*®–Trusts & Estates, 2012–present
- Selected for inclusion in Wisconsin Super Lawyers, *Law & Politics* and *Milwaukee Magazine,* 2005–present
- Editor, *Wisconsin Law Review*
- Beta Gamma Sigma, National Honor Society for Graduate Business Students
- Judicial Intern, Seventh Circuit Court of Appeals

Articles/Presentations

- Carl frequently lectures at continuing legal education seminars on various estate and tax issues

Community Involvement

- Board Member and Co-Chair of Land Trust Committee, Root-Pike Watershed Initiative Network
- Past Chairman, State of Wisconsin Elections Board
- Fellow, Wisconsin Law Foundation
- Member, Kenosha Area Business Alliance
- Past Board Member, Kenosha County Civil Service Commission
- Past President, Society of Financial Service Professionals, Milwaukee Chapter
- Past Board Member and Board Counsel, Women and Children's Horizons
- Past Board Member, Kenosha Historical Society
- Past Board Member, All Saints Catholic School
- Past Board Chair, Hyslop Foundation Inc.

Education

- University of Wisconsin (J.D. *cum laude)*
- University of Wisconsin–Milwaukee (M.S.–Taxation)
- Marquette University (M.A.–History)