

# STEPHANIE J. BAUS

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## CORE COMPETENCIES

Productivity & Efficiency ♦ Business Entities ♦ Management ♦ Organization ♦ Document Drafting ♦ Research & Analysis ♦ Attention to Detail ♦ Team Leadership & Development ♦ Case Development & Management ♦ Strategic Alliances ♦ Written & Verbal Communication ♦ Client Relationships ♦ Computer Proficiency ♦ Organizational Change ♦ Vendor Management ♦ Real Estate ♦ Nonprofit Organizations ♦ Proofreading ♦ Political & Economic Policy ♦ Document Management ♦ Problem & Dispute Resolution ♦ Mitigation ♦ State & Federal Court Systems ♦ Complex Litigation ♦ Securities ♦ Tax ♦ Accounting & Payroll ♦ Strategic Financial Planning ♦ Contracts ♦ Business Planning ♦ Invoicing ♦ Business Reports

## PROFESSIONAL EXPERIENCE:

**FREELANCE PARALEGAL SERVICES, LLC, Plymouth, WI**

**Owner/Freelance Paralegal**

July 2015 to Present

- Business entity formation, dissolution and management.
- Corporate stock and asset sales.
- Mergers and Acquisitions
- Nonprofit organization, taxation and management.
- Corporate records management.
- Stock issuance, redemption and transfers.
- Contract negotiation and management.
- Commercial and residential real estate.
- Document drafting.
- Trademark Filings.
- Trademark and Patent management and renewals.
- Registered Agent Services.
- Annual Reports.
- Business planning and reporting.
- Invoicing, accounts receivable and payable, business and tax accounting.
- Legal support in various practice areas.

**SELF-EMPLOYED, Plymouth, WI**

**Tax preparer/Consultant**

Feb. 1999 to Present

- Prepare income taxes for individuals, small businesses and non-profit organizations.
- Prepare monthly, quarterly & annual reports and business taxes, including state, federal and DWD.
- Accounting and tax consulting to individuals and small businesses, including new hire reporting.
- Assist clients with audit preparation and dispute resolution with the IRS.

**BAUS TRANSPORT, LLC, Sheboygan, WI**

**Business Manager**

March 2012 to April 2015

- Contract negotiation and management.
- Business planning and reporting.
- Cost analysis.
- Invoicing, accounts receivable and payable, business and tax accounting.
- Compliance with all state and Federal DOT regulations and licensing requirements.
- Employee benefits and payroll processing.
- Organization of fleet maintenance.

**KERSTEN & MCKINNON, S.C., Mequon, WI**

**Paralegal/Independent Contractor**

May 2011 to April 2016

- Complex litigation paralegal specializing in class action, securities and general litigation.
- Assist in case/class action settlement process.
- Case/file management and organization expertise.

**GASS WEBER MULLINS, LLC, Milwaukee, WI**

**Paralegal**

April 16, 2009 to April 30, 2011

- Complex litigation paralegal specializing in product liability, securities and corporate defense.
- Member of the nation's most prominent food safety defense team.
- Trial assistant (manage witnesses, exhibits, jury pool background research, etc.).
- Extensive work researching and retaining expert witnesses.
- Extensive research and case development.
- Draft pleadings and correspondence.
- Manage large cases with voluminous documents.
- High level summarization of testimony, medical records and other documents.

**KERSTEN & MCKINNON, S.C., Mequon, WI**

**Paralegal/Legal Assistant**

Oct. 1, 2004 to April 15, 2009

- Complex litigation paralegal specializing in class action, product liability, securities and general litigation.
- Lead paralegal in case resulting in largest jury verdict in state history.
- Trial assistant (manage witnesses, exhibits, file and help with cross-examination questions).
- Extensive work retaining expert witnesses and working with them in preparation of testimony.
- Assist in depositions and settlement conferences.
- Extensive research and case development.
- Extensive work editing, writing, assembling and filing briefs in all jurisdictions.
- Draft pleadings and correspondence.
- Case/file management and organization expertise.
- Significant Court of Appeals and State Supreme Court experience.

**WORLD FINANCIAL GROUP, WORLD GROUP SECURITIES INC. & INVESTMENT ADVISORS INTERNATIONAL, INC., Greenfield, WI**

**Independent Contractor/Registered Rep/IAR**

July 2000 to July 2010

- Long-term financial planning.
- Help individuals and small businesses build and manage wealth.
- Build and maintain strong client relationships with integrity and an educational approach to money and finance.
- Conduct extensive financial and economic research and analysis.
- Built a large client base primarily through referrals.
- Built strong relationships with several product provider companies and economists.
- Organized and taught financial classes to the public and other investment professionals.
- Recruited, trained and managed a team of investment professionals.
- Received many awards including *WFG Rising Star Award*, awards for sales, production levels and team-building.

**THE LEGAL REGISTRY, Milwaukee, WI**

**Paralegal/Legal Secretary Temp.**

July 16, 2003 to Oct. 1, 2004

- Several temporary legal assignments including:
  - Quarles & Brady LLP**
    - Primarily corporate defense work in many practice areas.
    - Worked with several different practice groups utilizing my broad knowledge of legal practice areas.
    - Assistant to senior partner in labor and employment law group.
    - Able to quickly learn different areas of law and take over where needed with very limited training.
  - Runkel, Ansay & Haggenjos, S.C.**
    - Assistant to Senior Partner.
    - Specialized in high net worth divorce cases (*i.e.*, splitting corporations and large assets, etc.).
    - Prepared extensively for trials.
    - Detailed organization of document-intensive files.

**SEEK, INC., Sheboygan, WI**

**Paralegal Temp.**

Nov. 2002 to Dec. 2002

- Temporary assignment at Neuman, Humke, Moir, Mueller & Bohrofen, S.C.
- Assisted in the transition as the firm merged with another law firm.

- Provided support primarily in family law practice area.

**DILLMAN, HOLBROOK, WURTZ & ROTH, LLP, Sheboygan, WI**

**Legal Secretary/Paralegal**

July 1999 to May 2000

- Assistant to Senior Partner.
- Specialized in family law, corporate, small claims and collections.
- Assisted extensively with client interaction and relationship management.
- Extensive case development and management.
- Drafted legal documents, pleadings, correspondence and financial statements.
- Research and analysis.
- Organized and managed document-intensive files.
- Transformed major accounts and developed good working relationship with these business clients.
- Prepared income taxes for both individuals and corporations.

**LAW OFFICE OF ATTORNEY MICHAEL T. SULLIVAN, JR., Milwaukee, WI**

**Legal Secretary/Paralegal**

March 1998 to May 1999

- Assisted in Court and in preparation for hearings.
- Research.
- Drafted pleadings and estate planning documents.
- Extensive client interaction.
- Provided extensive clerical support for office, including billing.
- Handled accounting of business expenses.

**U.S. HOUSE OF REPRESENTATIVES, HON. THOMAS E. PETRI, Washington, D.C.**

**Congressional Intern**

Aug. 1997 to Dec. 1997

- Answered and directed constituent concerns.
- Assisted with the weekly radio show.
- Conducted research in various legislative areas.
- Attended committee hearings and bill mark-ups to gather information for the office.
- Assisted with campaigns and local grass-root initiatives.
- Provided clerical and administrative support to the office.

**EDUCATION & TRAINING:**

**MARQUETTE UNIVERSITY, Milwaukee, Wisconsin**

B.A. degree in political science and business administration, May 1999.

**THE LES ASPIN CENTER FOR GOVERNMENT, Washington, D.C.**

Fall Semester 1997.

**UNITED NATIONS SEMINAR, United Nations, NY**

Summer Session, 1997.

Several continuing education classes and seminars including topics on law, insurance, finance, tax, sales, and personal growth and development

**LICENSES:**

- Series 6, 63 and 65 Securities in WI, MN, IA and CA (Previous).
- Life, Health and Disability Insurance in WI, IA and CA (Previous).
- Mortgage Loan Originator in State of Wisconsin (Previous).
- Notary Public in State of Wisconsin.
- ERO (Electronic Return Originator) in Wisconsin.