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## **EDUCATION**

**Marquette University Law School** – Milwaukee, WI. Juris Doctor, *Cum Laude*, 2011. Member of Pro Bono Society. Volunteer with Volunteer Income Tax Assistance Program (VITA), Marquette Volunteer Legal Clinic, and Milwaukee Justice Center Pro Se Family Law Clinic.

**St. Norbert College** – De Pere, WI. Bachelor of Arts, *Summa Cum Laude*, 2007. Major in Political Science, Minor in Sociology. Honors: Chapter President of Pi Gamma Mu Social Science Honor Society, Recipient of Rev. Robert Cornell Award for Excellence in Political Science.

## **WORK EXPERIENCE**

**Wessels & Liebau LLC (formerly Wessels Law Office LLC) – Mequon, Wisconsin.**

Partner, January 2019 – present.  
Associate, June 2016 – January 2019.

Practice focused on elder law, elder abuse litigation, estate planning, guardianship, special needs planning, estate administration, and public benefits. Work with clients to obtain public benefit eligibility and apply for public benefits such as Medicaid. Set up special need trusts for individuals with disabilities. Petition for and defend against guardianship and protective placements. Serve as guardian ad litem in court proceedings. Represent clients in disputes with nursing homes and assisted living facilities. Create customized estate plans.

**Willms, S.C. – Thiensville, Wisconsin.**

Associate, May 2011 – June 2016.

Launched elder law practice within traditional estate planning firm. Developed long-term care plans for clients to fund long-term care. Applied for public benefits such as Medicaid. Drafted traditional estate plans as well as estate plans designed to protect assets from

nursing home expenses and plans designed to provide for adult and minor beneficiaries with disabilities. Petitioned for guardianship and protective placements.

**Willms, S.C. – Thiensville, Wisconsin.**

Law Clerk, March 2009 – May 2011.

Served as sole law clerk for estate planning and estate administration law firm until graduation from law school. Assisted with drafting and reviewing estate planning, probate, and guardianship documents. Worked with clients to transfer assets into trusts. Performed various office administration tasks including but not limited to receptionist duties, file maintenance, and client database maintenance.

**Milwaukee County Corp. Counsel – Milwaukee, Wisconsin.**

Legal Intern, Aug-Dec 2010.

Assisted attorneys with guardianship, protective placement, and mental health commitments initiated by Milwaukee County. Drafted paperwork, prepared for court hearings, appeared in court pursuant to student practice rule.

**Legal Aid Society of Wisconsin – Milwaukee, Wisconsin.**

Legal Intern, Feb-May 2010.

Assisted attorney focusing on disability benefits. Assisted with successful petition to discharge student loans for an individual with a permanent disability. Assisted with successful Social Security Disability Insurance benefit appeals.

**PUBLICATIONS**

Editor, ***Elder Law and Special Needs Journal of Wisconsin (formerly Elder Law Journal of Wisconsin)***, Spring 2016 – Present.

Author, ***Screening for Elder Fraud and Abuse***, Wisconsin Lawyer Magazine, (January 2020)

Author, ***This is Why: Elder Abuse Awareness Day 2019***, Ozaukee News Graphic, (June 15, 2019)

Author, ***Combatting Elder Abuse in Ozaukee County***, Ozaukee News Graphic, (February 7, 2019).

Author, ***Am I Working too Hard to be Ethical?*** Elder Law and Special Needs Journal of Wisconsin, Vol 28., Issue 3 (December 2018).

Author, ***'She's Not Her Own Person' and other Peculiar Language***, Elder Law Journal of Wisconsin, Vol. 28, Issue 2 (August 2018).

Author, ***ABLE Account Update (The "Hidden Provisions" of the Tax Act)***, Elder Law Journal of Wisconsin, Vol. 28, Issue 1 (March 2018).

Author, ***Be the Voice of Reason We All Need***, Elder Law Journal of Wisconsin, Vol. 27., Issue 1 (Winter 2017).

Author, ***Is Elder Law Really the "Hot" New Practice Area?*** Elder Law Journal of Wisconsin, Vol. 26. Issue 3 (Fall 2016).

Co-Author, ***Annual Survey of Wisconsin Law: Elder Law***, State Bar of Wisconsin, February 2016.

Co-Author, ***Annual Survey of Wisconsin Law: Elder Law***, State Bar of Wisconsin, June 2015.

Author, ***Hardship Waivers, Divestment Exceptions, and Credit Card Debt: Recent Fair Hearing Decisions Provide Guidance and Uncertainty***, Elder Law Journal of Wisconsin, Vol. 24, Issue 3 (September 30, 2014).

Co-Author, ***Sprint Communications v. Jacobs: Recent Supreme Court Case Provides Additional Option for Medicaid Challenges***, Elder Law Journal of Wisconsin, Vol. 24, Issue 1 (April 3, 2014).

## **TEACHING AND TRAINING**

The following presentations are a selection of some of the teaching and training I have provided to attorneys, professionals, families, and government agencies related to my legal practice areas.

***Navigating the Intersection of Estate Planning, Divorce, and Business Law: Public Benefit Considerations in Divorce***, State Bar of Wisconsin, January 29, 2020.

***Elder Abuse and Financial Exploitation: A Wisconsin Approach***, Milwaukee Estate Planning Forum, October 2, 2019.

***Special Needs Trusts: A Complete Guide***, National Business Institute, September 23, 2019.

***Estate Planning for Every Phase of Life***, National Business Institute, September 11, 2019.

***Beyond the Settlement: Understanding Public Benefits and How Divorce May Affect Them***, (co-presenter), State Bar of Wisconsin Annual Family Law Workshop, Sturgeon Bay, Wisconsin, August 2, 2019.

***Identifying, Preventing, and Addressing Elder Abuse***, Home Helpers, Mequon, May 14 and 15, 2019.

***2019 Adult Guardian ad Litem Training***, State Bar of Wisconsin CLE Seminar, Madison, Wisconsin, May 17, 2019. (Also serving as program chair.)

***Conflict Resolution Skills and Processes for Advanced Dementia Care***, UW-Madison School of Continuing Studies, May 8, 2019.

***Estate Planning, Funeral Planning, and Long-Term Care Planning***, First Bank Financial Center, Mequon, March 21, 2019.

***Options to Avoid Trial in Family Law: Where Elder Law and Family Law ADR Meet***, State Bar of Wisconsin, Madison, Wisconsin, January 9, 2019.

***Admissions and Discharges in Long-Term Care: Resident Rights and Responsibilities***, Sheboygan Bar Association, December 11, 2018.

***Protecting Assets While Qualifying for Medicaid***, National Business Institute, Milwaukee, Wisconsin, December 7, 2018.

***Powers of Attorney, Guardianship, and Supported Decision-Making***, Ozaukee County Committee on Transition, Portal Inc., December 3, 2018.

***Mom's in the Nursing Home: Now What?*** Waukesha Estate Planning Council, September 20, 2018.

***2018 Adult Guardian ad Litem Training***, State Bar of Wisconsin CLE Seminar, Madison, Wisconsin, May 9, 2018. (Also served as program chair.)

***An Intro to Elder Law: Health Care Powers of Attorney***, State Bar of Wisconsin, Madison, Wisconsin, March 2, 2018.

***Admissions and Discharges in Long-Term Care: Resident Rights and Responsibilities***, Milwaukee Bar Association, February 27, 2018.

***ABLE Accounts and Special Needs Trusts***, Nicolet High School Special Needs Parents Group, February 8, 2018.

***ABLE Accounts and Special Needs Trusts***, Down Syndrome Association of Wisconsin, January 30, 2018.

**Fair Hearing Update**, WI NAELA Annual Workshop, Wisconsin Dells, January 19, 2018.

**Everything You Need to Know about Elder Law and Medicaid Planning: Long-Term Care Planning Options and New and Future Trends**, National Business Institute, Milwaukee, Wisconsin, September 2017.

**2017 Adult Guardian ad Litem Training**, State Bar of Wisconsin CLE Seminar, Madison, Wisconsin, May 2017. (Served as program chair.)

**Estate Planning for Children with Disabilities**, Homestead High School VOICES parents' group, Mequon, Wisconsin, Mar. 27, 2017.

**ABLE Account Update**, Milwaukee Bar Association, Milwaukee, Wisconsin, Dec 16, 2016.

**Guardianship and Protective Placement Proceedings**, Legal Action of Wisconsin Volunteer Lawyer Program Training, Milwaukee, Wisconsin, Nov. 2016.

**Guardianship and Elder Law Mediation**, Elder Law Mediation Training, Mount Mary University, Milwaukee, Wisconsin, Nov. 2016.

**ABLE Accounts and Special Needs Trusts**, GE Healthcare, Wauwatosa, Wisconsin, March 22, 2017, Oct. 13, 2016, Sept. 7, 2016.

**Special Needs Trusts: What to Use, When to Use It, and What Clients Need to Know**, Milwaukee Bar Association, Milwaukee, Wisconsin, October 27, 2015.

**What You Must Know About Medicaid**, Ozaukee County Aging Consortium, Port Washington, Wisconsin, October 15, 2015.

**Exploring Capacity Issues**, Association of Women Lawyer's Estate Planning Group, Milwaukee, Wisconsin, May 20, 2015.

**2015 Adult Guardian ad Litem Training: Advanced Topics**, State Bar of Wisconsin, Madison, Wisconsin, May 14, 2015. (Served as moderator.)

**Case Law and Administrative Law Update**, Wisconsin National Academy of Elder Law Attorneys Annual Workshop, Wisconsin Dells, Wisconsin, January 23, 2015.

**Estate Planning for Young Adults**, Marquette University Business School, Milwaukee, Wisconsin, November 10, 2014.

**Case Law and Medicaid Fair Hearing Update**, Legal issues of the Aging Conference, State Bar of Wisconsin, Madison, Wisconsin, September 26, 2014.

***Exploring Capacity Issues***, Milwaukee Bar Association, Milwaukee, Wisconsin, April 29, 2014.

***Estate Planning: What to Do with What you Have***, Women's Business Initiative Corporation, Greenfield, Wisconsin, October 8, 2013.

***Estate and Long-Term Care Planning: A Different Approach***, Sarah Chudnow Community, Mequon, Wisconsin, September 29, 2013.

***Estate Planning for Farmers and Ranchers: Insurance and Retirement Planning***, National Business Institute, Eau Claire, Wisconsin, June 18, 2013.

***Trust Income Taxation Guide: Legal Ethics, and Drafting to Avoid Income Tax Liability***, National Business Institute, Eau Claire Wisconsin, February 21, 2013.

***Elder Law Basics: Determining Capacity, and Addressing Elder Abuse***, Milwaukee Bar Association, Milwaukee, Wisconsin, February 19, 2013.

## **PROFESSIONAL MEMBERSHIPS**

**State Bar of Wisconsin.** Member 2011 – present.

**State Bar of Wisconsin Elder Law and Special Needs Planning Section.** Board of Directors July 2017 – present.

**National Academy of Elder Law Attorneys (NAELA).** Member of national and Wisconsin chapters, 2011 – present.

**Milwaukee Bar Association.** Member 2011 – present.

**Ozaukee Bar Association.** Member 2011 – present.

**Association of Women Lawyers.** Member, 2011 – present.

## **CERTIFICATIONS**

Elder Mediator. Winnebago Conflict Resolution Center. Training completed November 2014.

## **COMMUNITY INVOLVEMENT AND VOLUNTEERING**

### **Mequon Thiensville Chamber of Commerce**

Vice President, September 2019 – present.

Board of Directors, Sept 2016 – present.

Ambassador Committee, Chair July 2017 – present.

**Balance, Inc.**

Board of Directors, March 2020 - Present

**Life Navigators, Inc.**

Trust Committee, Apr. 2016 – present.

Friends Group, Chairperson, Mar. 2012 – 2018.

**Legal Action of Wisconsin Volunteer Lawyers Project**

Volunteer Lawyer, 2019- present

**Ozaukee County Free Health Care Power of Attorney Clinic**

Volunteer Attorney, 2017-present.

**Ozaukee County Interdisciplinary Team on Elders at Risk**

I-Team Member, Feb 2018 - present.

**Alzheimer's Association.**

Volunteer 2016 – present.

Member of Alzheimer's Impact Movement (AIM) 2016 – present.

**Thiensville Business Association**

Treasurer, May 2014- Mar 2017.