



Robert G. Alexander, JD, LL.M., AEP, EPLS

## Professional Biography 2009

Attorney Robert G. Alexander is the President and majority shareholder of Alexander & Klemmer, S.C., located in Milwaukee, Wisconsin and “Of Counsel” to Gonzalez, Saggio & Harlan, LLP, a highly respected national law firm with offices located in major cities throughout the United States. He earned a B.A. in English from the University of Wisconsin-Madison, J.D. from the University of Wisconsin-Madison Law School, and an LL.M. in Taxation from DePaul University. Mr. Alexander entered into private practice in 1978 and concentrates his practice in the areas of domestic and international wealth transfer, asset protection and family business planning, including federal estate and gift taxation; trust and estate administration; fiduciary income taxation; life insurance planning; retirement planning; charitable planning; business organization and succession planning and international tax planning. He has earned professional designations as a Board Certified Estate Planning Law Specialist (EPLS) as accredited by the American Bar Association, and as an Accredited Estate Planner (AEP) by the National Association of Estate Planners and Councils (NAEPC). He is AV rated by Martindale-Hubbell, its highest rating in legal ability and ethical standards.

Mr. Alexander currently holds the office of secretary for the National Association of Estate Planners & Councils and serves on the board of directors of the Estate Planning Law Specialist Board, Inc. (2003 to the present). He is the chairperson of the NAEPC professional development and education committee, serves on the NAEPC committee administering the accredited estate planner designation, and the NAEPC Foundation Committee. He is an NAEPC delegate to the Synergy Summit, a leading national estate, tax, and financial think tank, where he also serves as the immediate past chairperson and is on the editorial advising board of *Wealth Management Magazine*. Mr. Alexander served for two years as the original Publishing Editor of the NAEPC’s academic journal, *The NAEPC Journal of Estate and Tax Planning*; and for three years on the board of directors of the Milwaukee Estate Planning Council.

He is a nationally known author and speaker who lectures and teaches extensively for both public and private organizations, including the NAEPC, national continuing legal education providers, the Wisconsin Institute of CPA’s, major insurance companies, brokerage firms, banks, trust companies, community foundations, charitable organizations, and various local colleges.

Mr. Alexander is a member of the American Bar Association sections on Real Property, Probate and Trust Law and Taxation; the State Bar of Wisconsin; the National Association of Estate Planners and Councils; the Milwaukee and Waukesha Estate Planning Councils; the Society of Financial Service Professionals and the Society of Trust and Estate Practitioners (STEP). Mr. Alexander is admitted to practice in Wisconsin, the U.S. District for the Eastern and Western Districts of Wisconsin, the Seventh Circuit Court of Appeals, and the U.S. Tax Court.

Significant Recent Speaking Engagements include:

1. July 2009 – Northwestern Mutual Financial Network Annual Convention – Milwaukee, Wisconsin. Physicians Nationwide.  
- The Beneficiary Defective Inheritor’s Trust – A Powerful New Wealth Planning Strategy
2. June 2009 - Real Estate’s Place in Wealth Management and Financial Planning – Atlanta, Georgia. France Publications.  
- Legal & Tax Strategies for New Investments, Already Owned and To Be Passed-On Commercial and Residential Property
3. May 2009 - Spokane Estate Planning Council Annual Meeting. Gonzaga University Law School  
- Super-charging Wealth Transfer and Asset Protection Planning with Grantor Trusts  
- Selected Issues In Fiduciary Duties and Liabilities  
- Tax Disasters and Other Conundrums: What Can Be Done to Correct All These Problems
4. March 2009 – Northwestern Mutual Life Insurance Company. The Estate and Business Planning Specialists Conference; Milwaukee, WI  
- Beneficiary Defective Inheritor’s Trust (“BDIT”) – Finessing the Pipe Dream
5. January 2009 – Palm Beach Tax Institute; Palm Beach, FL.  
- Income Tax Issues With Respect to LLC and Partnership Interests Held In Trust
6. Society of Financial Services Professionals 2008 Forum – Las Vegas, Nevada;  
- Advanced Estate and Asset Protection Planning for Tax-Qualified Assets  
- Panelist: Family Business Succession Planning
7. 2008 Sid Kess-The Ultimate Estate and Retirement Conference - Las Vegas, NV.  
- What Every Practitioner Needs to Know About International Estate Planning.
8. Charles Schwab Impact 2008- Atlanta, GA.  
- Super-Charging Wealth Transfer and Asset Protection Planning with Grantor Trusts.

Significant Current Publications include:

1. The Cash Value Beneficiary Defective Inheritor’s Trust (The “Cash Value BDIT”) – Creating a More Flexible and Comprehensive Wealth Accumulation and Retirement Plan.  
  
Publishing: Date October 2009, NYU Review of Employee Benefits and Executive Compensation; Matthew Bender & Company, Inc.
2. Enhancing the Planning Value of GRATs - Part 2 – CCH: Financial and Estate Planning Report No. 352, April 2009, and the Journal of Practical Estate Planning, Feb./Mar. 2009.
3. Enhancing the Planning Value of GRATs - Part I – CCH: Financial and Estate Planning Report No. 350, Feb. 2009, and the Journal of Practical Estate Planning, Nov./Dec. 2008.

4. The Beneficiary Defective Inheritor's Trust (BDIT) – Finessing the Pipe Dream. CCH Practitioner's Strategies, Nov. 2008. Co- authored with Attorney Richard A. Oshins.

Significant Books include:

1. Trust Administration and Trustee Selection. Chicago: Guarantee Trust Company, 2003. Rev. Ed. 2009, Alexander & Klemmer, S.C.
2. Succession Planning for Closely Held Businesses. Chicago: Guarantee Trust Company, 2003.

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