FOLEY
FOLEY & LARDNER LLP


# Stephanie J Derks

## Senior Counsel

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Milwaukee
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Stephanie Derks concentrates her practice on estate planning for high-net-worth families and family offices, estate and business succession planning for closely-held business owners, trust and estate administration, tax compliance, and other wealth planning matters. Stephanie understands the unique dynamics involved when working with families and family-owned companies. She strives to provide creative and comprehensive solutions to achieve clients' estate, business, and tax planning goals. She is a member of the firm's Estates and Trusts Practice.

## Representative Experience

- Achieved client's goal of generational family ownership of closely held business through utilizing creative trust ownership structure.
- Applied advanced estate and tax planning techniques to allow for the gradual transition of a closely-held business to the next generation, while ensuring the current generation's financial security and the company's long-term sustainability.
- Implemented estate planning methods, such as irrevocable trusts, GRATs, SLATs, and installment sales, to transfer wealth to different family members while minimizing tax implications.
- Played an integral role in creating a family office and continued to work with the family office to implement creative tax-saving solutions.
- Administered large estates with complex assets and tax issues and advised family members through the estate administration process.
- Worked with businesses and other organizations to apply innovative special-purpose trusts.

## Awards and Recognition

- Received, Best Lawyers: Ones to Watch recognition for:
- Corporate Law (2022)
- Trusts and Estates (2021-2024)

## Community Involvement

- Board Member, Curative Care Network, Inc.
- Volunteer, Wills for Heroes
- Participant in the 2019 -2020 Young Professional Adviser Council (YPA) with the Greater Milwaukee Foundation.

## Presentations and Publications

- Co-presenter, “Trustees and Beneficiaries Workshop,” Family Office Exchange Family Office Forum (September 30, 2025)
- Presenter, “Charitable Gifts of Special Assets,” Planned Giving Council Series (Fall 2019; Fall 2020; Fall 2021, Spring 2022)

## Sectors

- Family Offices
- Manufacturing

## Practice Areas

- Corporate
- Estate Planning

## Education

- University of Wisconsin Law School (J.D., cum laude)
  - Managing Editor, *Wisconsin Law Review*
- University of Wisconsin-Madison (B.A.)
  - Certificate in European studies

## Admissions

- Wisconsin