

## Rose M. Sadlon \*

### Wealth Planning CPA

*\* Not admitted to practice law*

## Overview

Rose brings the strategic insights and perspective gained from her experience as a certified public accountant and registered tax return preparer to her focus on estate planning matters.

Her focus includes:

- Estate and trust administration
- Preparation of fiduciary, individual, death, partnership, private foundations, and gift tax returns
- Financial analysis and tax planning

Prior to joining Michael Best, Rose administered trusts for nine years in the Trust Department of Bank One Milwaukee, N.A., currently JP Morgan Chase.

## Professional Activities

- Member, Wisconsin Institute of Certified Public Accountants (WICPA)
- Member, Professional Association of Wisconsin, Estate and Trust Specialty Section
- Certified Public Accountant (1996)
- Volunteer, Internal Revenue Service VITA Program

## Education

- University of Wisconsin-Parkside, Bachelor of Science (B.S.), 1994
- Real Estate Institute, Broker License, 1986
- Certified Public Accountant (CPA)

## Community Involvement

- Member & Volunteer, The Basilica of St. Josaphat



rmsadlon@michaelbest.com

### Milwaukee

T. 414.347.4748

### Legal Assistant

#### Aaron Baumann

agbaumann@michaelbest.com

T. 414.347.4743

### Practices

Corporate  
Wealth Planning

## Related News

**PUBLICATION**

March 20, 2020

Tax and Estate Planning Considerations in Light of the Coronavirus

**PUBLICATION**

March 18, 2020

Tax and Wealth Planning Updates re COVID-19