

Sheila Boothby Stevens

Partner

Overview

Sheila works with clients to help them preserve and protect their wealth – and plan for its stewardship in the future. She takes the time to understand each client's unique circumstances and goals. She then works compassionately and creatively with clients to devise personalized estate plans that are tailored to their needs and save taxes.

Sheila regularly lectures on estate planning and charitable giving topics. She is a co-author of the chapter on revocable trusts in Eckhardt's *Workbook for Wisconsin Estate Planners*, an estate-planning guide for Wisconsin lawyers.

Experience

Sheila is experienced in all aspects of wealth planning, including:

- Estate planning, including wills, trusts, and powers of attorney
- Marital property, including prenuptial agreements
- Elder law
- Trust and estate administration
- Gift and estate taxation
- Charitable planning
- Business succession planning

Honors & Recognitions

- *The Best Lawyers in America*®, Trusts and Estates law, 2008-present
- *The Midwest's Best Lawyers*®, Trusts and Estates law, 2021

Professional Activities

- Board Member and Member of Planned Giving Committee, Agrace Hospicecare Foundation, Inc.
- Member, Madison Estate Council



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Legal Assistant

Julie Gehl

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Practices

Corporate
Wealth Planning

- Member, Wisconsin Planned Giving Council
- Leadership Greater Madison 9
- Member, American Bar Association
- Member, State Bar of Wisconsin, Real Property, Probate and Trust Law Section and Elder Law Section

Education

- The University of Iowa College of Law, Juris Doctor (J.D.), with high distinction, 1995; Order of the Coif
- The University of Iowa, Bachelor of Arts (B.A.), with highest distinction, 1992; Phi Beta Kappa

Admissions

- Wisconsin

Community Involvement

- Past Director, Madison Public Library Foundation, Inc.
- Past Director, Ronald McDonald House Charities of Madison, Inc.
- Past Director, The Business Forum and The Business Forum Foundation

Related News

PUBLICATION

January 11, 2021
Estate and Tax Planning in 2021

PUBLICATION

November 16, 2020
Estate and Tax Planning After the 2020 Election – Review Amid Georgia Runoffs

PUBLICATION

September 11, 2020
Estate Planning Before Year End

NEWS

August 20, 2020
Ninety-Two Michael Best Attorneys Earn Top Honors in The Best Lawyers in America 2021 List

PUBLICATION

May 5, 2020
Planning with Low Interest Rates and Temporarily Reduced Asset Values



PUBLICATION

March 30, 2020
Update on Tax Filing and Payment Deadlines

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

PUBLICATION

February 25, 2020
Top Issues in 2020: Wealth Planning

NEWS

August 15, 2019
Michael Best Attorneys Named The Best Lawyers in America© 2020