DeWitt LLP Law Firm



Jeff A. Goldman

Partner

Madison, Wisconsin

608-395-6730

jag@dewittllp.com

Service Areas:

- Appellate
- Business
- International
- Litigation
- Real Estate, Land Use & Construction
- Trusts & Estates

Education:

- J.D., *cum laude*, University of Wisconsin Law School
- B.A., Economics, University of Washington

Admissions:

- New York
- Washington (inactive)
- Wisconsin

Jeff is the Chair of the Trust & Estates practice group and focuses on trusts, estates, fiduciary litigation and administration, estate planning, and probate. He is also experienced in commercial litigation, charitable entities, and taxation. His combination of experience in the courtroom handling complex and routine estate and trust administration issues, and drafting a variety of estate plans for his clients gives him a special perspective that truly sets him apart from his peers.

He understands that no one looks forward to planning for their death, but he also knows it is one of the most important things a person can do to ensure that their financial, family, and philanthropic goals in life are met—even after they are gone. Jeff works with individuals of all walks of life to ensure what they have worked so hard for is passed on to the appropriate beneficiaries.

Affiliations

- Fellow - American College of Trust and Estates Council (ACTEC) (since 2020)
- Chair of the Real Property, Probate, and Trust Section of the State Bar
- Executive Committee of the Board of Governors for the State Bar of Wisconsin (2021-2022)
- Member of the Board of Governors for the State Bar of Wisconsin and Board of Governor's Liaison to the Real Estate, Property, Probate, and Trust Section (2016-2022)
- Board Member and Treasurer of Real Property, Probate, and Trust ("RPPT") Section of the State Bar of Wisconsin
- Past President and Board Member – Madison Estate Council
- Fellow – Wisconsin Law Foundation
- Dane County Bar Association
- Wisconsin Bar Association
- New York State Bar Association
- Washington State Bar Association
- Board Member and Secretary – Breast Cancer Recovery

Articles & Presentations

Jeff served as an adjunct professor of law at the University of Wisconsin Law School, teaching estate and trust administration and dispute resolution from 2010 - 2017. He has also taught continuing legal education classes on estate and trust issues for the State Bar of Wisconsin and other continuing legal education providers.

Awards & Recognitions

- Wisconsin Law Journal’s Power List for Estate Planning (2024)
- Lawyer of the Year (2024), Best Lawyers in America® - Trust & Estates
- Lawyer of the Year (2022), Best Lawyers in America® - Trust & Estates
- Best Lawyers in America® – Trusts & Estates (Since 2016)

Clients

His clients include personal representatives and trustees; beneficiaries of estates or trusts; banks and trust companies; businesses and individuals needing representation in disputes; everyday people in need of estate planning; and charitable entities looking to achieve tax-exempt status and maintain federal and state compliance.

Notable Representations

- Jeff routinely prepares estate plans to meet clients' needs with bequests and trusts to provide for their loved ones, appoint guardians for their minor children, save thousands or millions of dollars in estate, income, gift and generation-skipping taxes, and appoint appropriate agents to make their financial and healthcare decisions
- He has drafted estate plans for individuals with estates ranging from less than $50,000 to more than $20 million, and knows the right questions to ask in order to produce a practical, comprehensive and effective estate plan that meets the client's needs
- He has drafted plans including many types of property, including closely held businesses, real estate, retirement plans and life insurance
- He has represented clients challenging or defending the validity of wills and trusts, challenging or defending the performance of trustees, personal representatives, and persons acting under powers of attorney, and in proceedings to terminate or modify trusts
- When an estate was confronted with claims of common law marriage and an alleged oral contract by the decedent to pay another person's debts, Jeff convinced the court to dismiss both claims
- Jeff resolved the rightful heirs of a deceased person's estate by commencing a paternity action involving an estate and compelling the alleged heir to submit to a DNA test
- He obtained a favorable out of court settlement on behalf of a client who challenged the validity of a trust amendment executed shortly before trust maker's death
- In a case involving a difficult trust beneficiary, Jeff successfully petitioned the court on behalf of the trustee to terminate the trust, discharge the trustee, and substitute an annuity for the beneficiary
- Jeff has assisted businesses and individuals in court cases and arbitrations involving contract disputes, breach of agent's duties, and recovery of property or money
- He has formed numerous non-profit charitable entities on behalf of clients and has successfully helped the entities obtain tax-exempt charity status

Service Area Subspecialties

- Trust & Estates
  - Estate Planning
  - Probate
  - Trust Administration