FOLEY
FOLEY & LARDNER LLP

George A. Dionisopoulos

Partner

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George A. Dionisopoulos advises high-net-worth families, and their businesses, charitable foundations, and trusts regarding planning arrangements tailored to their specific needs. He is a partner in the firm's Estate Planning Practice, counseling corporate and individual trustees regarding all facets of trust and estate administration.

George provides counsel regarding fiduciary responsibilities and best practices, and audits with the Internal Revenue Service and state tax authorities. He assists closely held business owners and corporate executives with their particular needs and advises private clients in successfully transferring family businesses inter-generationally.

George is a former chair of the firm's National Estate Planning Practice.

Representative Experience

- Counsels private charitable foundations and supporting organizations regarding the unique fiduciary rules governing tax compliance, excess business holdings and trust administration, and specialized planning for charitable gifts and bequests to charitable trusts and foundations, charitable lead and remainder trusts, donor advised charitable funds, and other tax exempt entities.
- Advises family businesses on succession planning to preserve the company for future generations through the effective transition of ownership, control, and management, including shareholder agreements, corporate recapitalizations of voting control, voting trust agreements; and addressing the unique liquidity issues confronting family businesses due to estate taxes and operational liquidity needs upon the death of a shareholder or key executive.
- Provides specialized planning to prepare closely held businesses for sale, and pre-transaction planning to address income tax considerations and non-operational assets held on the balance sheet.
- Advises families regarding estate planning to preserve privacy and flexibility while making effective use of tax exemptions and asset protection trust arrangements.

- Implements "estate freeze" planning for proactive use of tax exemptions, including lifetime gift strategies through Grantor Retained Annuity Trusts (GRATs), Installment Sales to Defective Grantor Trusts (IDGTs), Irrevocable Life Insurance Trusts (ILITs), Qualified Personal Residence Trusts (QPRTs), family loans, and other arrangements.
- Advises corporate executives regarding specialized planning for stock options, deferred compensation, and other executive benefits.
- Counsels families on all aspects of trust and estate administration, including fiduciary responsibilities, rights and interests of beneficiaries; management of estate and gift tax audits, and all related services to administer estates and trusts effectively in accordance with the donor's intent.

Awards and Recognition

- Recognized in *Chambers USA: America's Leading Lawyers for Business* for Private Wealth Law
- *The Best Lawyers in America*©, Trusts and Estates (1997-2024)
- Ranked Band 1 in Chambers High Net Worth Guide for Private Wealth Law in the USA: Wisconsin
- *Wisconsin Super Lawyers*®, estate planning
- Peer Review Rated as AV Preeminent®, the highest performance rating in Martindale-Hubbell® Peer Review Ratings™ system
- Best Lawyers® Estates and Trusts "Lawyer of the Year" in Milwaukee (2015)
- "Leader in the Law" by the *Wisconsin Law Journal*, which recognizes and celebrates leading practitioners and judges based on a wide variety of achievement criteria, including outstanding leadership and vision

Affiliations

- Fellow of the American College of Trust and Estates Counsel
- Past president of the Milwaukee Estate Counselors Forum

Community Involvement

- Board member, Renaissance Theaterworks, a Milwaukee Theater company with a mission of improving gender parity in the arts
- Honorary Co-chair, Meta House capital campaign, with a mission to end the generational cycle of addiction by healing women and strengthening families
- Previous board positions include leadership roles with the Milwaukee Repertory Theater, Ten Chimneys Foundation, Neighborhood House, Old World Wisconsin Foundation, and the Wisconsin Historical Society

Sectors

- Manufacturing

Practice Areas

- Corporate

- Estate Planning
- Foley Private Client Services

Education

- Harvard University (J.D., cum laude, 1980)
    - Phi Beta Kappa
- University of Illinois (Bachelor, summa cum laude, 1976)

Admissions

- Wisconsin