

KELLY M. SPOTT

Helping You Make a Plan

Kelly leads O'Neil Cannon's Trust, Estates and Succession Planning Group. She assists clients with estate planning, succession planning, probate administration, trust administration, and inheritance litigation. She is licensed to practice law in both Wisconsin and Florida.

Kelly enjoys working with families and believes in educating her clients on how their estate plan will work while they are alive, what happens in an emergency, and what happens upon the loss of a loved one. She believes that a good estate plan will help ease potential family tensions and stress upon the loss of a loved one.

Kelly grew up working on her family's dairy farm and her mother's family's 3rd generation machine shop. She watched many business decisions being made at the kitchen table and understands how family dynamics are inseparable from the family business. She appreciates the ingenuity, perseverance, and dedication required of business owners to grow and expand their businesses.

Kelly Assists Clients With

- Estate Planning for Families
 - Wills for Young Families
 - Revocable Trusts
 - Testamentary Trusts
- Reviewing and Amending Existing Estate Plans
- Maximizing Tax Efficiencies for Beneficiaries
- Transferring Wealth to the Next Generation
- Powers of Attorney
- Avoiding Probate
- Funding Revocable Trusts to Avoid Probate
- Structuring IRA and 401(k) Beneficiary Designations
- Helping Manage a Deceased Loved One's Affairs
 - Trust Administrations
 - Probate Administrations
 - Non-probate transfers
- Inheritance Litigation Matters

- Will Contests
- Undue Influence Case
- Trustee Disputes
- Probate Disputes
- Fiduciary Controversies

Forms Library

- Estate Planning Inventory and Questionnaire



Attorney Image



Attorney Thumb

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Other Information

Experience/Representative Client Work

- Advanced Planning Attorney, Northwestern Mutual, 2016-2017
- Associate Attorney, Mawicke and Goisman, S.C., 2013-2016
- Clerk, Waukesha County Probate Registrar, 2013

Professional Associations and Affiliations

- Member, State Bar of Wisconsin
- Member, Society of Financial Service Professionals
- Board Member, Society of Financial Service Professionals
- Member, Professional Dimensions

Awards/Distinctions

- Martindale-Hubbell® Peer Review Rating™ –AV, reflecting an attorney who has reached the height of professional excellence and is recognized for the highest levels of skill and integrity
- Selected for inclusion on *The Best Lawyers in America: Ones to Watch* list, 2021–present
- Selected for inclusion in Wisconsin Super Lawyers Rising Stars, *Law and Politics and Milwaukee Magazine*, 2022–present
- Dean’s List, Marquette University
- Member, Alpha Sigma Nu-Jesuit Honor Society
- Member, Sigma Delta Pi-National Collegiate Hispanic Honor Society
- CALI Award-Real Estate and Finance Development, 2012



Articles/Presentations

- Eckhardt’s Workbook for WI Estate Planners, “Planning for Nonprobate Transfers,” March 2019

Community Involvement

- Member, Soles for Catholic Education Walk committee

In The News

- Super Lawyers Recognizes 30 O'Neil Cannon Attorneys
- 20 O'Neil Cannon Lawyers Selected as 2025 Best Lawyers; Another 5 Named Best Lawyers: Ones to Watch
- Kelly Spott Elected Practice Group Leader for the Trust, Estates and Succession Planning Group
- Super Lawyers Recognizes 28 O'Neil Cannon Attorneys
- 19 O'Neil Cannon Lawyers Selected as 2024 Best Lawyers; Another 4 Named Best Lawyers: Ones to Watch
- *Super Lawyers* Recognizes 25 O'Neil Cannon Attorneys
- 19 OCHDL Lawyers Selected as 2023 Best Lawyers®; Another 4 Named Best Lawyers: Ones to Watch
- Tax and Wealth Advisor Alert: What is an Estate Plan?
- Tax and Wealth Advisor Alert: What Should You Do If You Are Named Trustee?
- 19 OCHDL Lawyers Selected as 2022 Best Lawyers®; Another 5 Named Best Lawyers: Ones to Watch
- FEMA Launches COVID-19 Funeral Assistance Program
- O'Neil Cannon Elects Kelly M. Spott and Trevor Lippman as Shareholders
- 20 OCHDL Lawyers Selected as 2021 Best Lawyers®; Another 5 Named Best Lawyers: Ones to Watch
- Tax and Wealth Advisor Alert: Estate Planning During the COVID-19 Crisis—Ensuring Your Documents are Legally Enforceable
- Tax and Wealth Advisor Alert: The Potential Impact of Post-Valuation Date Events on Gift Tax Valuations
- Aretha Franklin's Estate: Are Handwritten Documents Valid Wills?
- Attorney Kelly M. Spott Receives Peer Review Rating™ from Martindale-Hubbell®
- Tax and Wealth Advisor Alert: How to Make Spendthrift Trusts Work for You
- Tax and Wealth Advisor Alert: How Much Should a Trustee Be Paid?
- OCHDL Is Pleased to Announce That Attorney Kelly M. Spott Has Joined the Firm

Education

- Marquette University Law School
- Marquette University (B.S.)