


From Chaos to Cohesion: Creating an Effective Board Structure

Presented By:
Attorney Amy Ebeling
October 11, 2023

Attorney Amy Ebeling presents:


From Chaos to Cohesion:

Creating an Effective Board Structure



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Amy E. Ebeling
Attorney

500 N First Street, Suite 8000
P.O. Box 8000
Wausau, WI 54403-8000
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Cell: 715.845.2700
Fax: 715.845.2718

Amy is an attorney with a passion for tax efficient planning and setting businesses up for success.

For over 15 years, Amy has counseled business owners, high net worth individuals, and non-profit organizations on business and tax law matters, focusing on mergers and acquisitions, business succession planning, and tax exempt structures. As a dedicated and knowledgeable legal professional, Amy has helped numerous clients navigate complex transactions and achieve their desired goals.

Services

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- Business Succession Planning
- fiduciary Services
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- Tax Exempt Organizations

Focus Teams

- Manufacturing & Distribution
- Agriculture
- COVID-19
- Business Recovery

Amy also has a long history working with tax exempt entities, including charitable foundations, community foundations, and private foundations. Because of her understanding of the unique tax considerations and legal requirements facing tax exempt organizations, her exempt board members and executive directors alike appreciate Amy's guidance.

Beyond her legal practice, Amy regularly volunteers her time and expertise to support local charities and non-profit organizations. She is committed to making a positive impact on the community and is actively involved in numerous organizations including the Community Partners Campus, Inc. and the B.A. & Esther Greenhook Foundation, Inc.

When she's not busy deciphering IRS guidance, Amy hones her skills as a negotiator, referee, mediator, and advocate by raising three energetic boys. As a proud big mom, she thrives on leading adventures, making learning moments, and fostering inquisitive minds.

CIVIC ACTIVITIES

- B.A. & Esther Greenhook Foundation - Board Member (2019 - Present)
- Community Partners Campus, Inc. - Board Member (2020 present)
- Good News Project - Volunteer (2018)




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Amy E. Ebeling
Attorney

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With a strong academic background and extensive experience in tax law, Amy has a deep understanding of the nuances and complexities of mergers and acquisitions and is committed to delivering tailored solutions to meet each client's unique needs. She is skilled at identifying and mitigating tax-related risks and ensuring a smooth transition of ownership and management while minimizing disruptions to business operations. Equipped with comprehensive tax and business experience, Amy devotes a significant amount of her time to advising clients on:

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Organizations
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& Acquisitions

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wnership Disputes

Organizations

experience, Amy devotes a significant amount of her time to advising clients on:

- Business succession planning,
- Management buyouts,
- Owner redemptions,
- Sales to third parties,
- Complex reorganizations and spin-offs that may be required for effective and efficient business transfers.

teams

ing & Distribution

covery

Amy also has a long history working with tax-exempt entities, including charitable foundations, community foundations, and private foundations. Because of her understanding of the unique tax considerations and legal requirements facing tax-exempt organizations, tax-exempt board members and executive directors alike appreciate Amy's guidance.

Beyond her legal practice, Amy regularly volunteers her time and expertise to support local charities and non-profit organizations. She is committed to making a positive impact on the community and is actively involved in numerous organizations including the Community Partners Campus, Inc. and the B.A. & Esther Greenheck Foundation, Inc.

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CIVIC ACTIVITIES

- **B.A. & Esther Greenheck Foundation** – Board Member (2023 – Present)
- **Community Partners Campus, Inc.** – Board Member (2020-present)
- **Good News Project** – Volunteer (2013)

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- Business Ownership Disputes
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- Real Estate & Construction Litigation
- Small Business/Business Start-up
- Tax Controversies & Litigation
- Tax Exempt Organizations
- Taxation
- Warranty/Product Litigation
- Workplace Human Resources Compliance Training

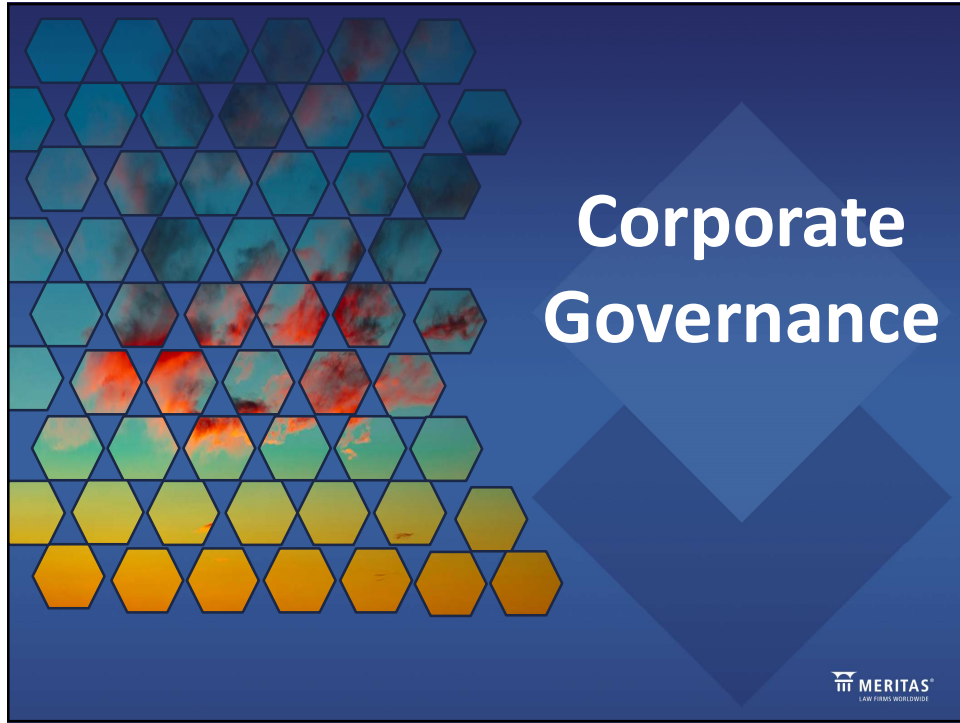
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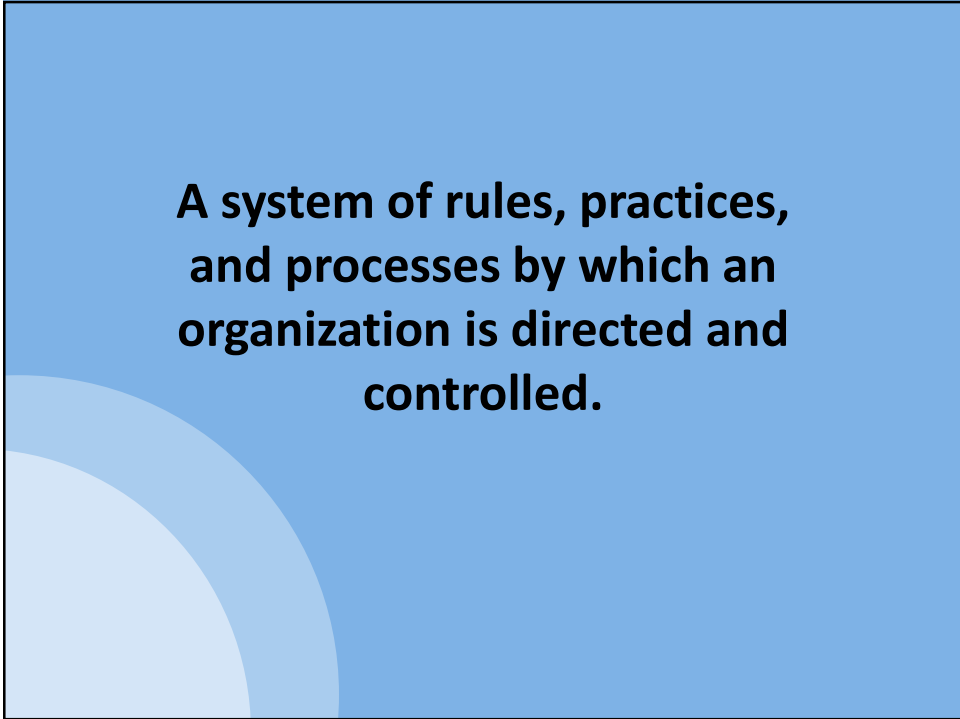
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**A system of rules, practices,
and processes by which an
organization is directed and
controlled.**

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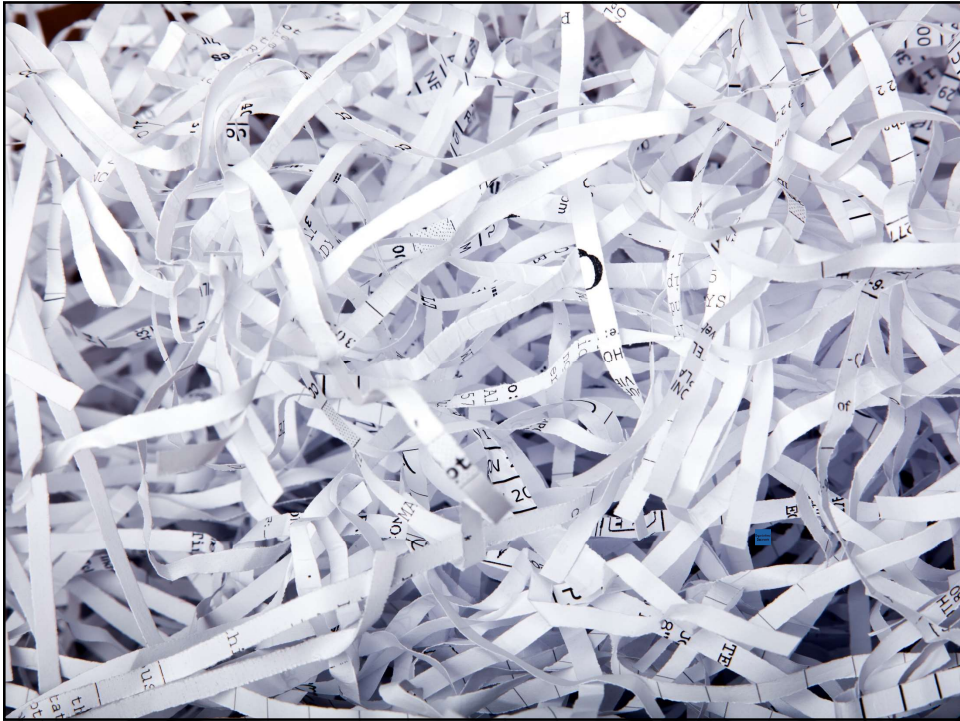


**One size does not
fit all.**

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**Federal and state law
impose requirements
and offer guidance.**

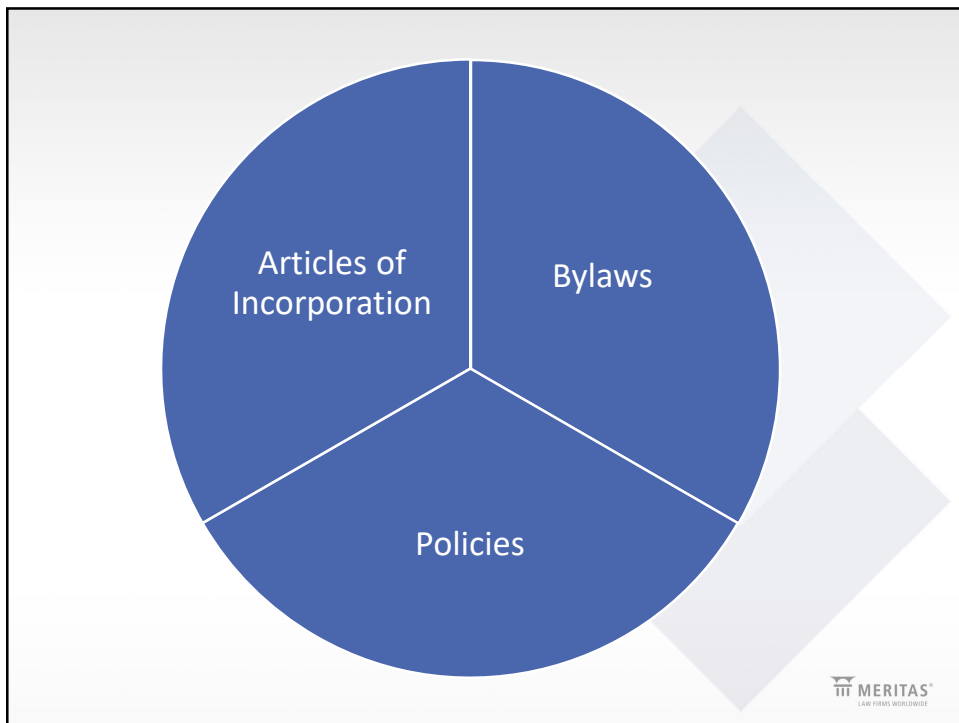
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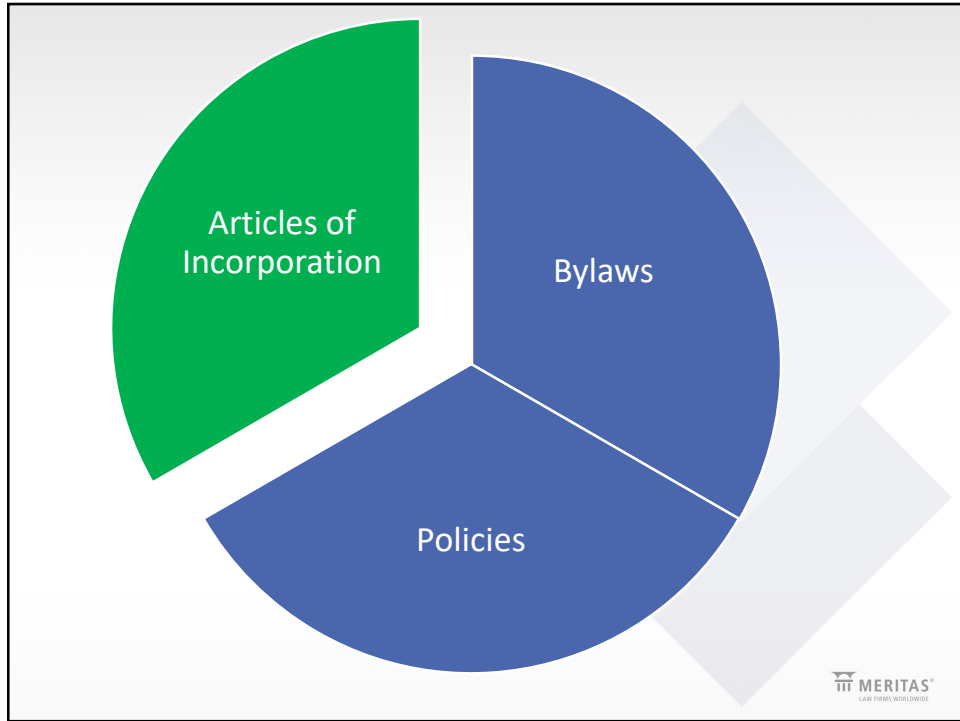
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Organizational Documents

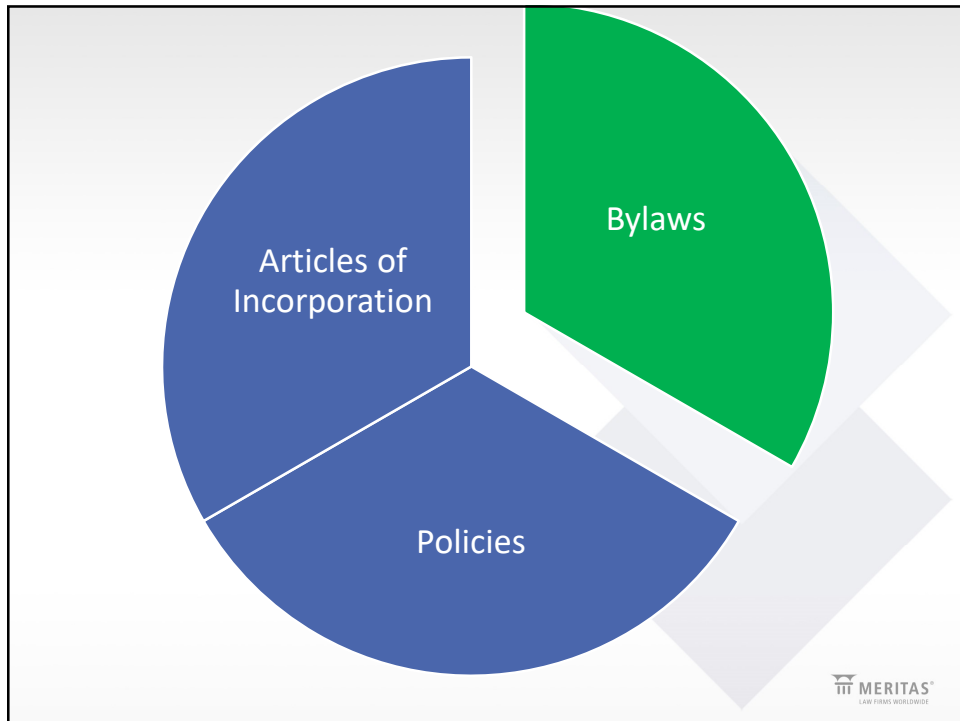
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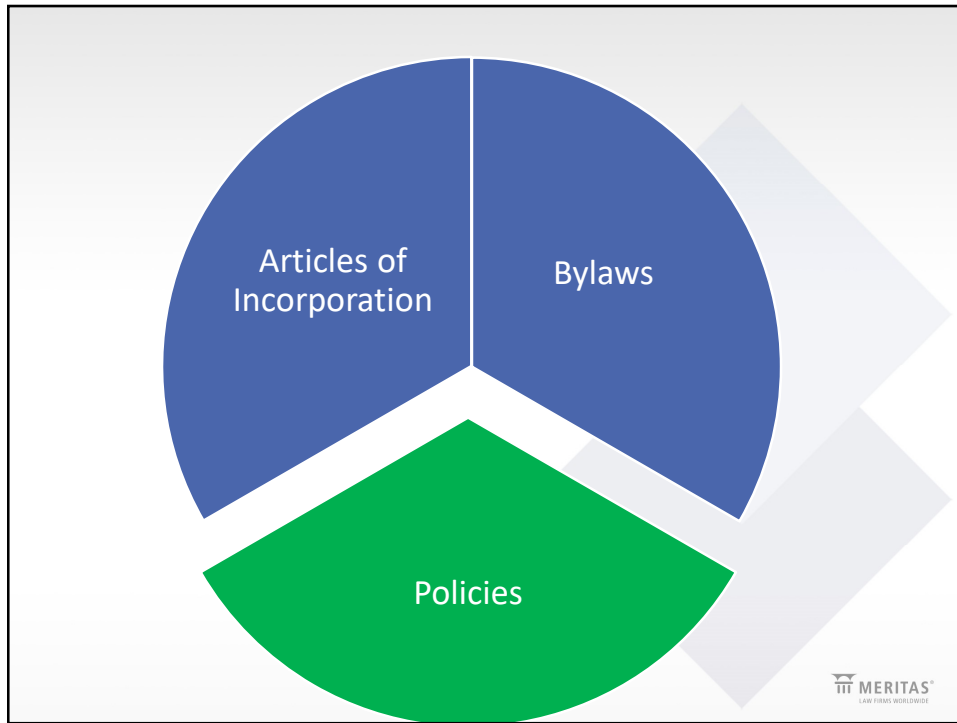
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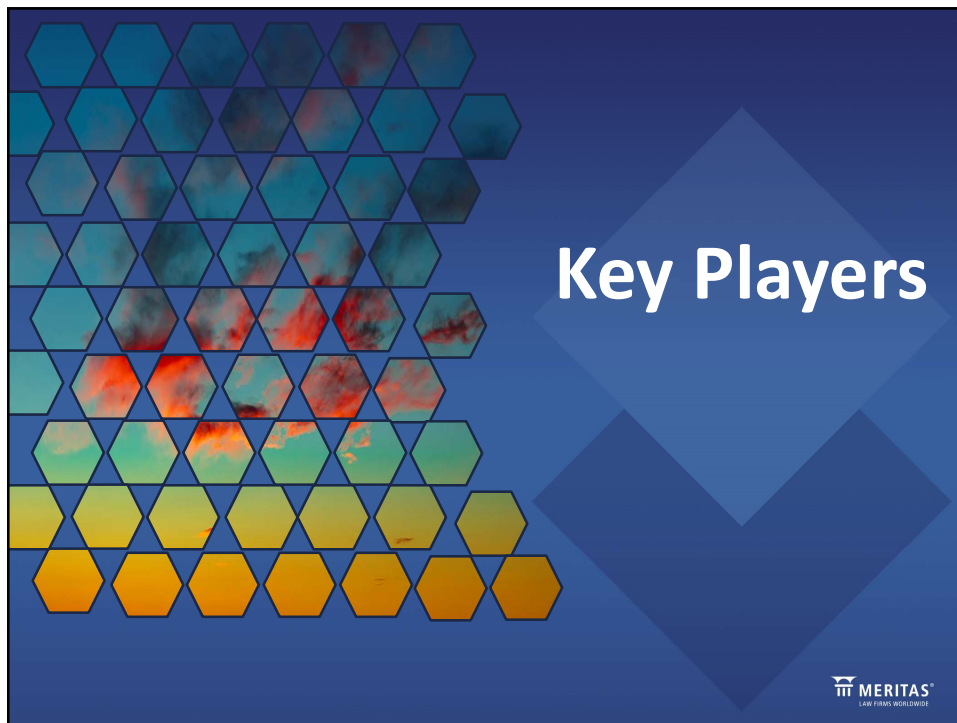
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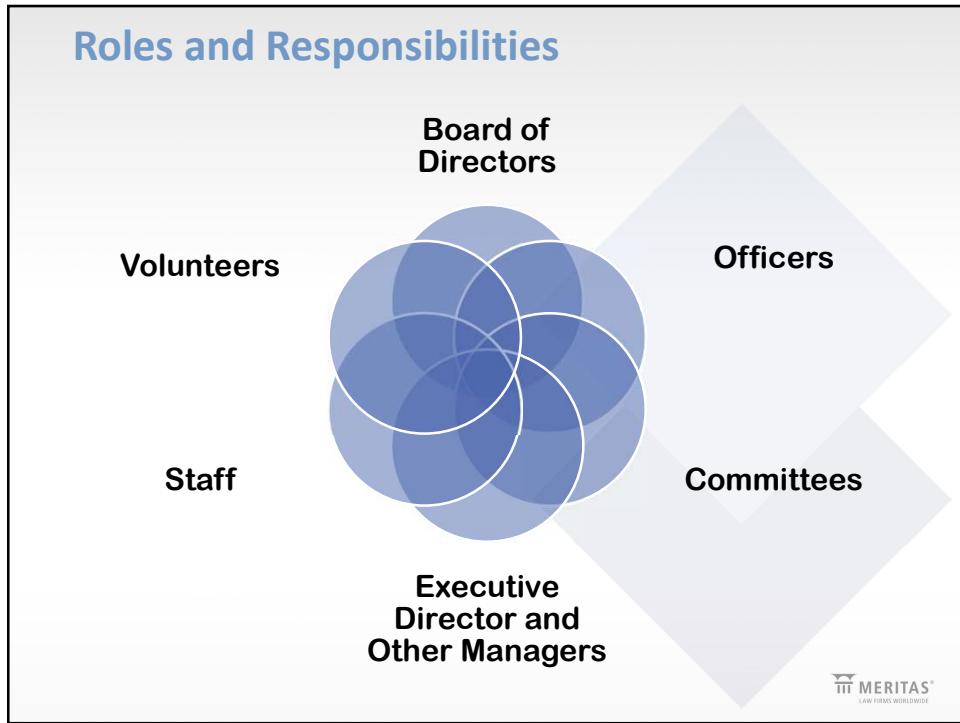
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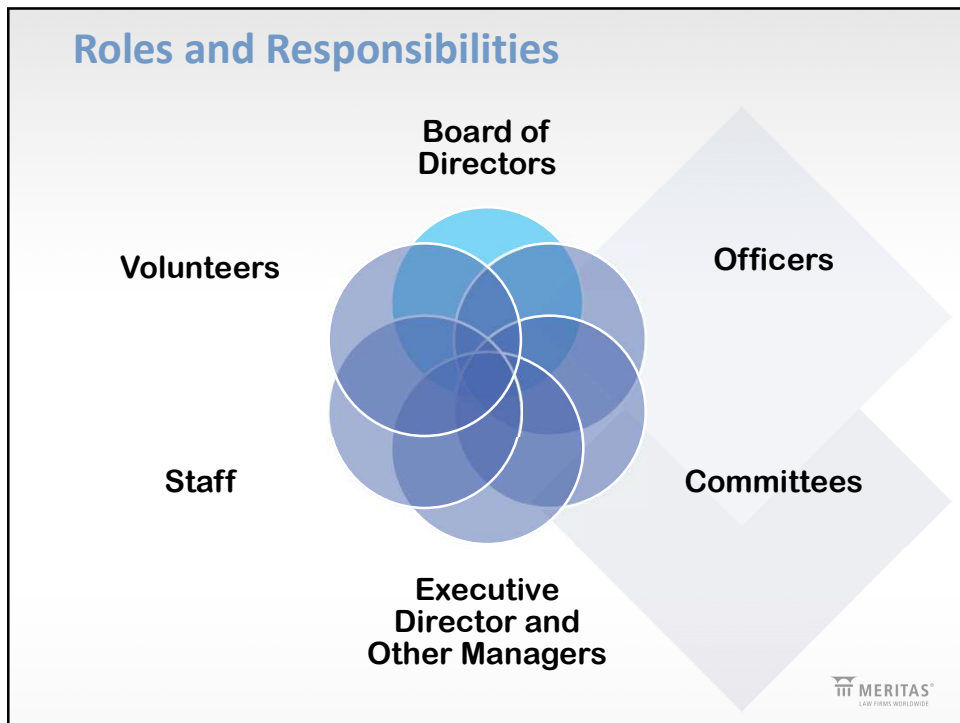
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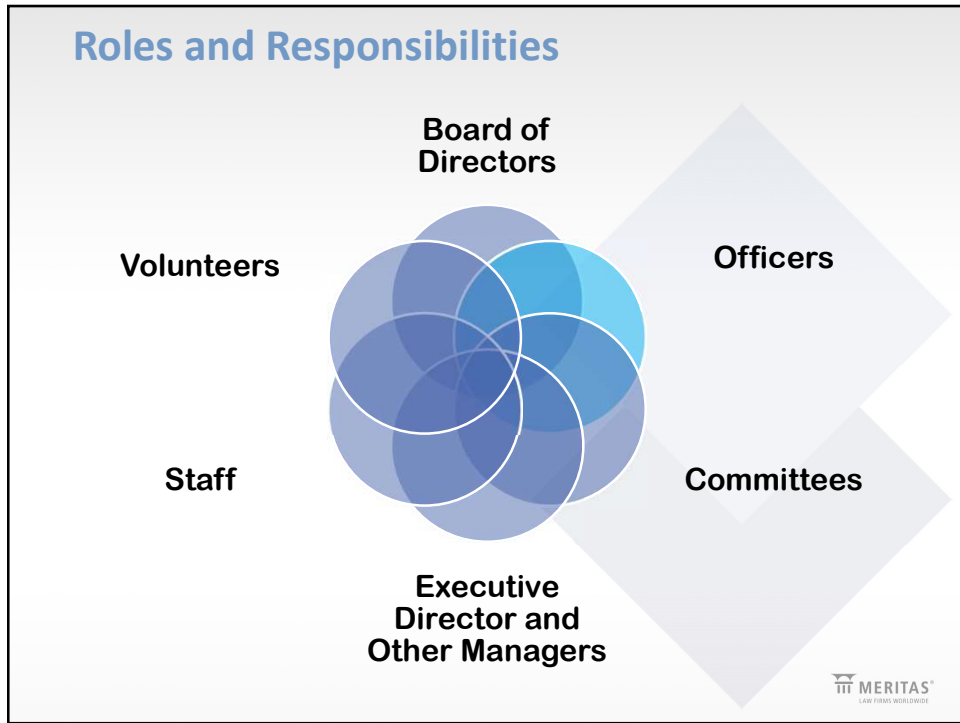
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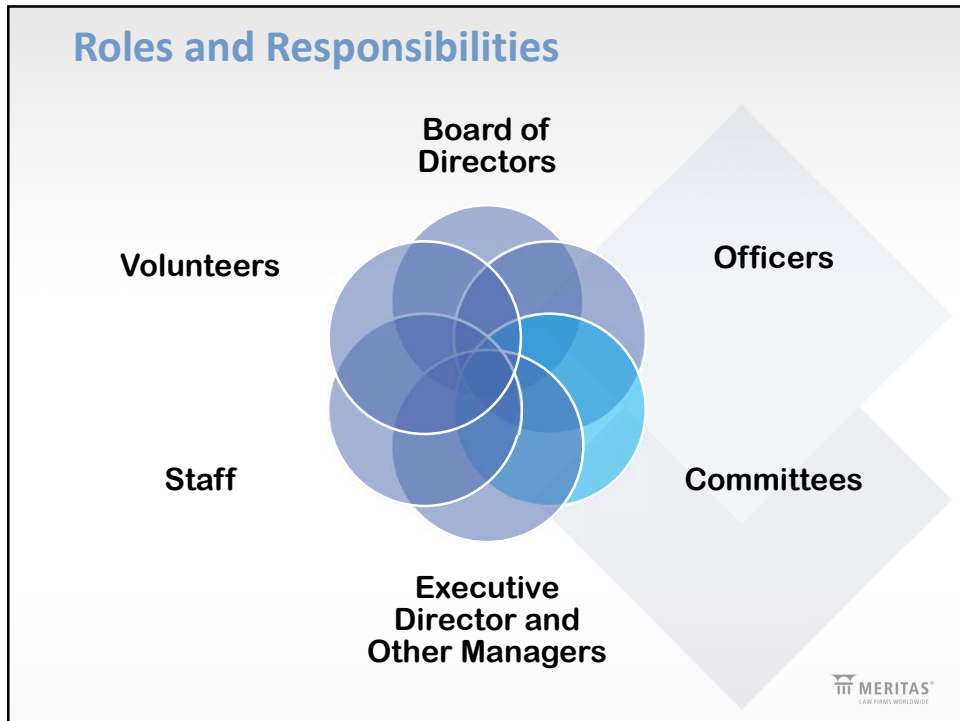
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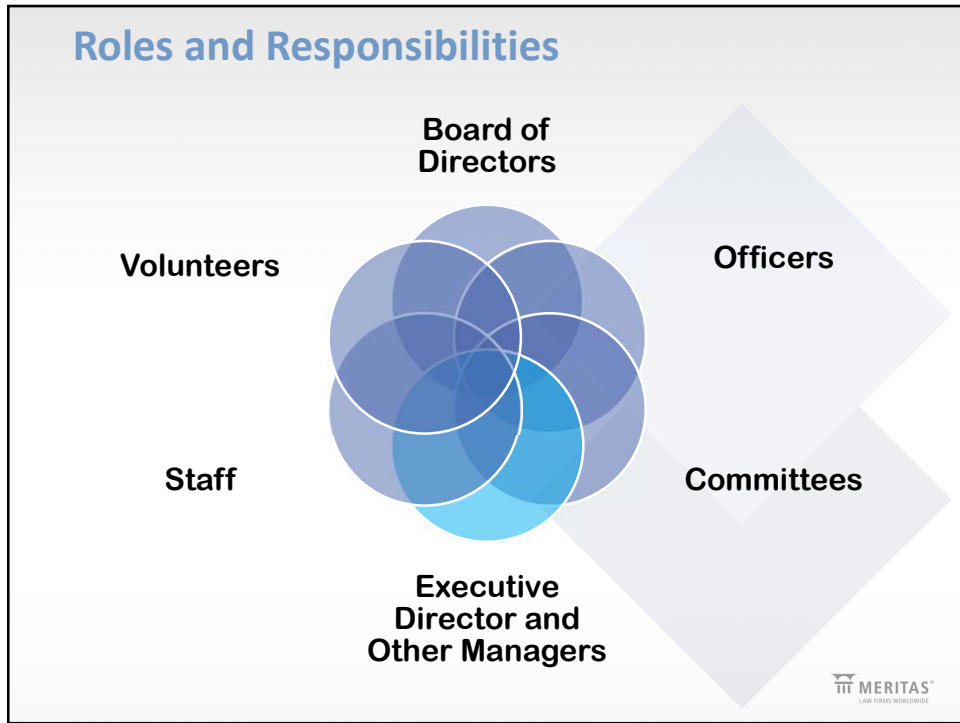
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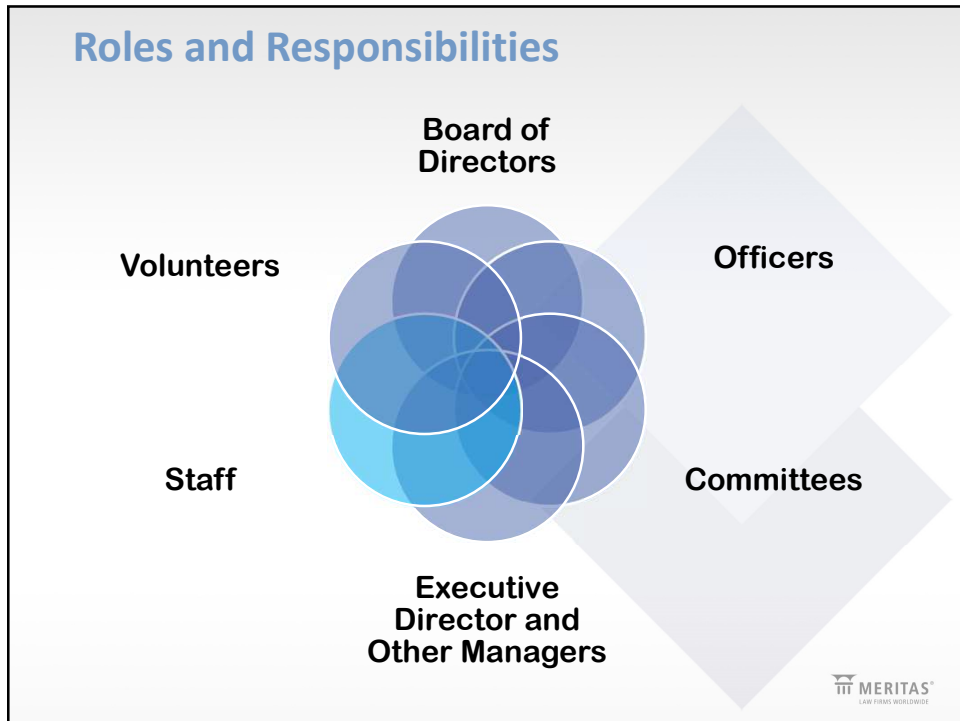
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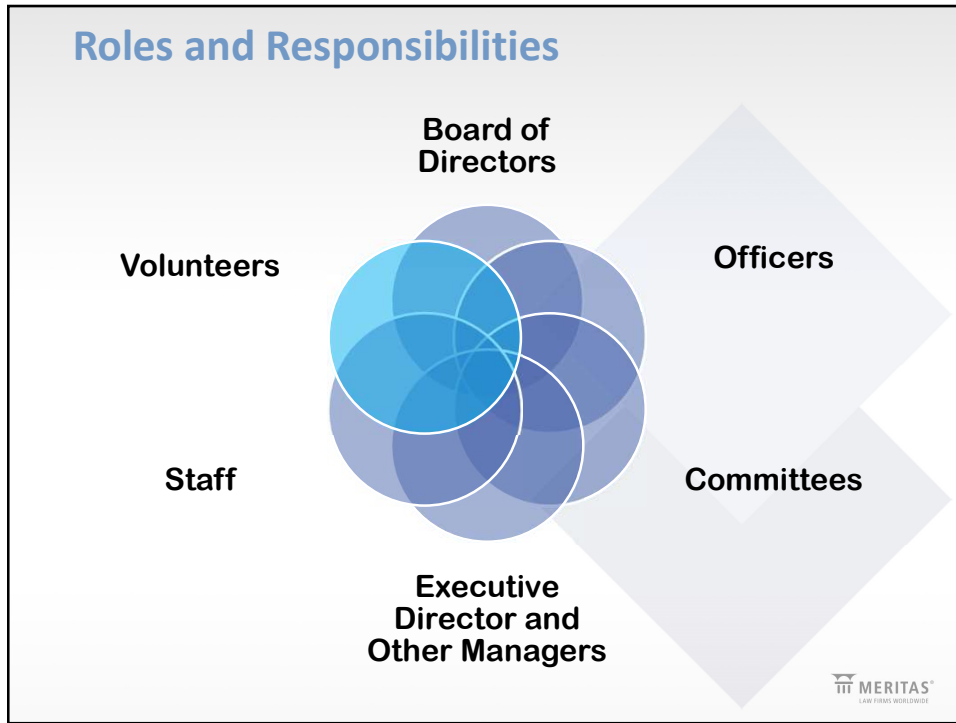
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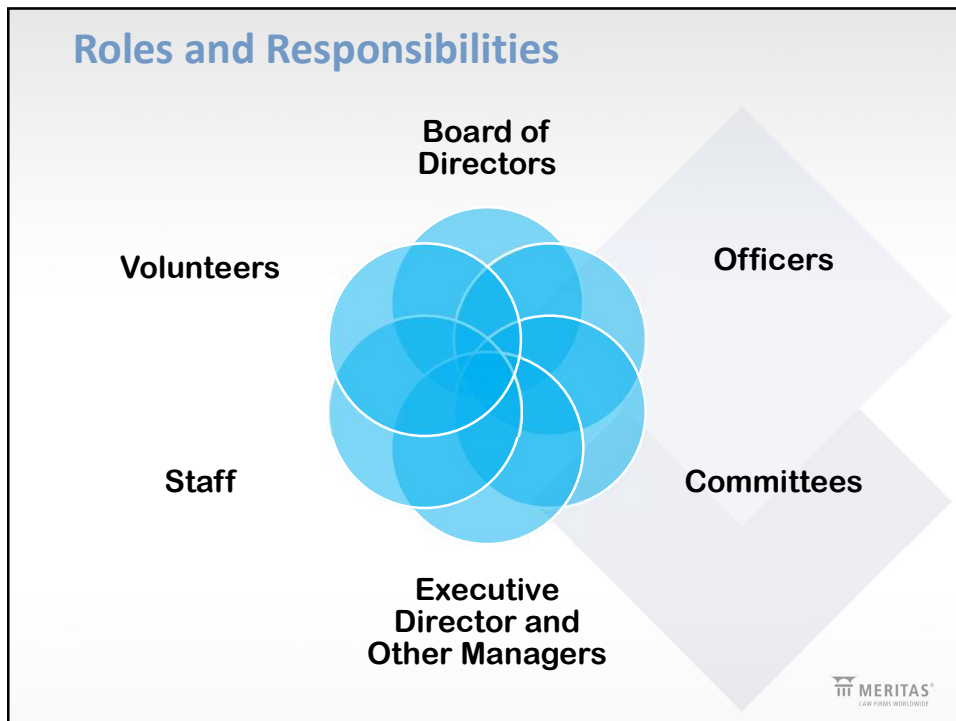
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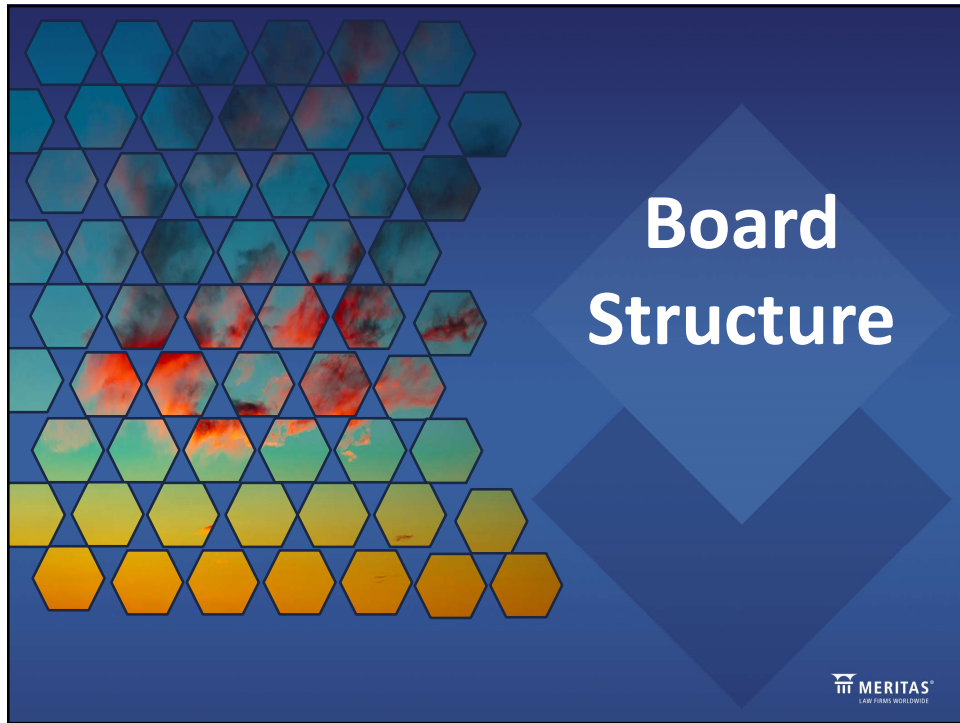
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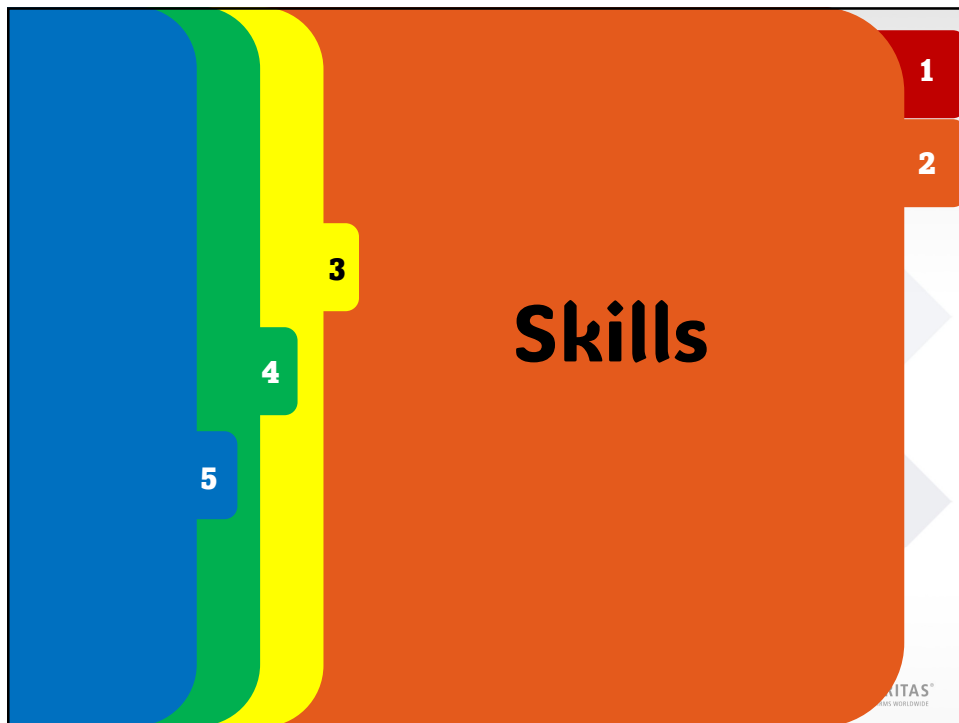
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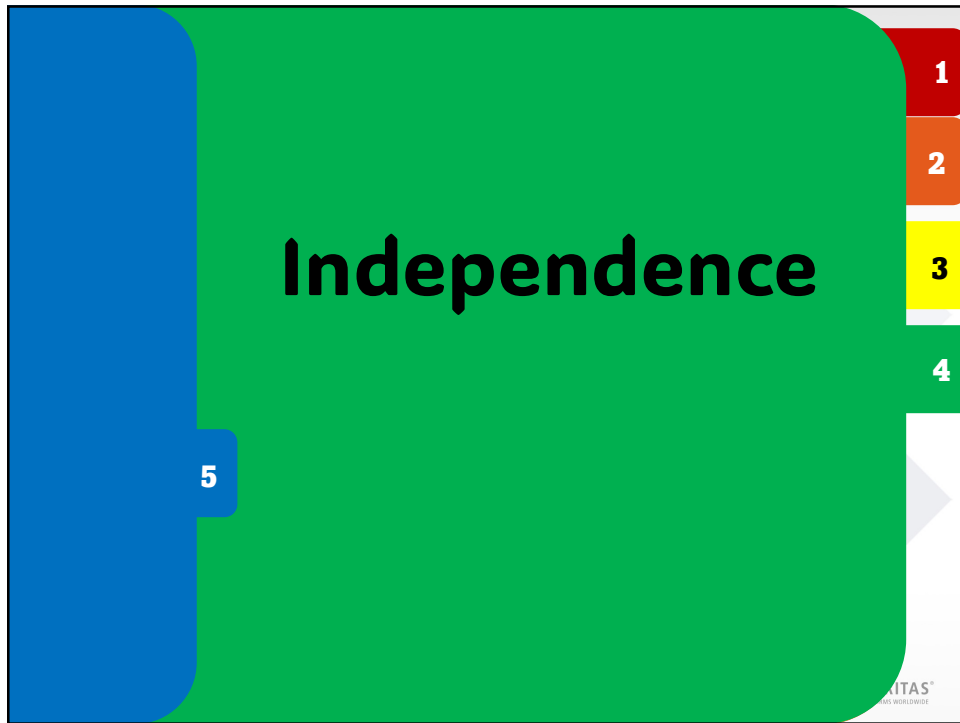
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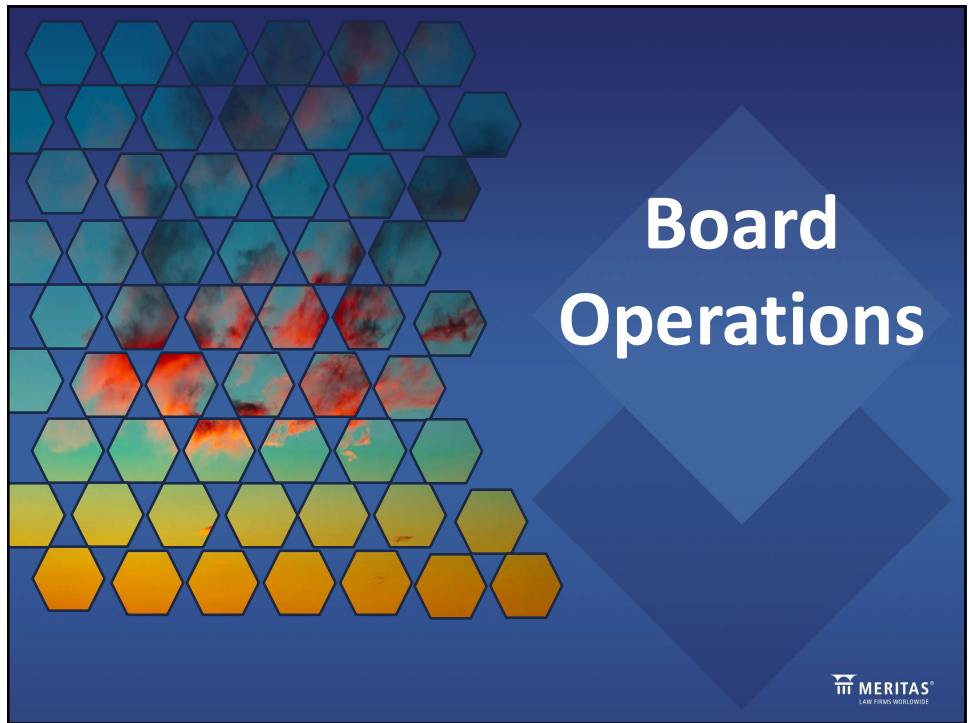
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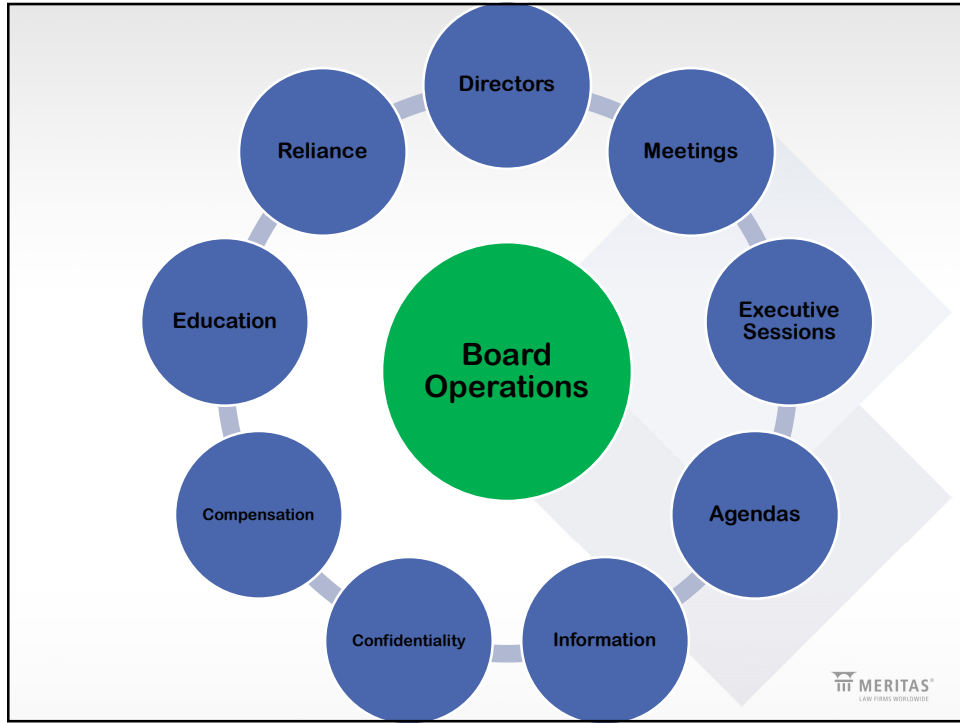
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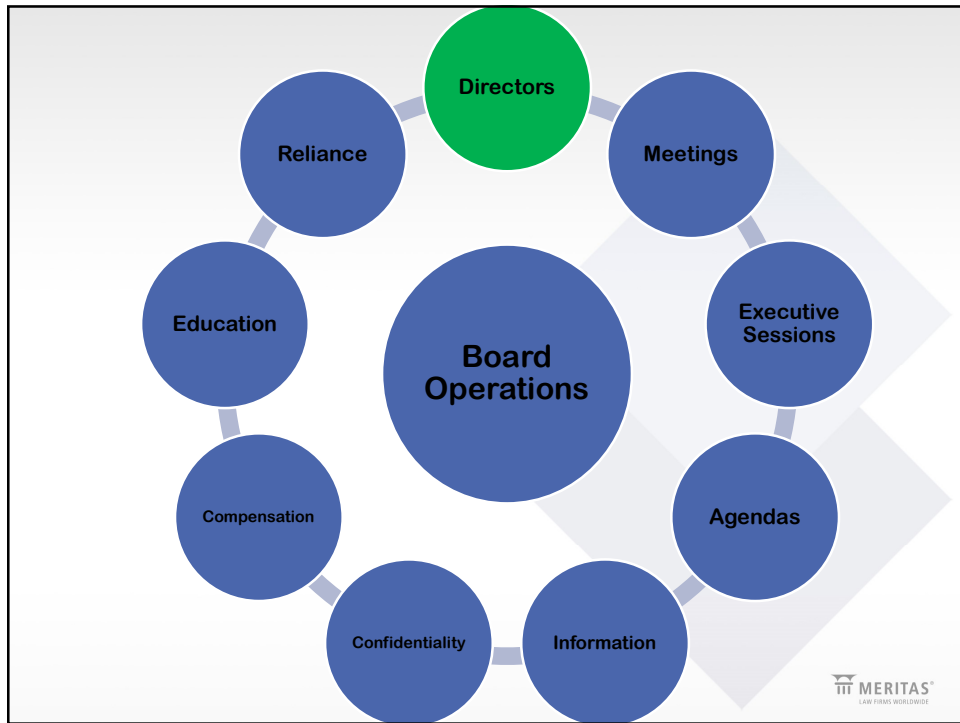
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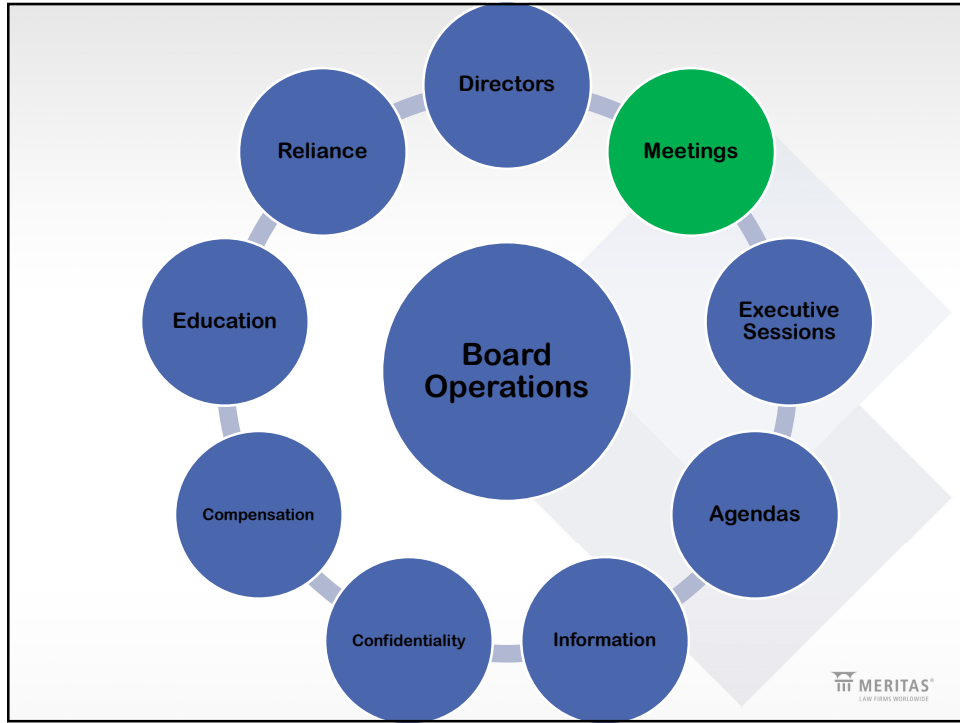
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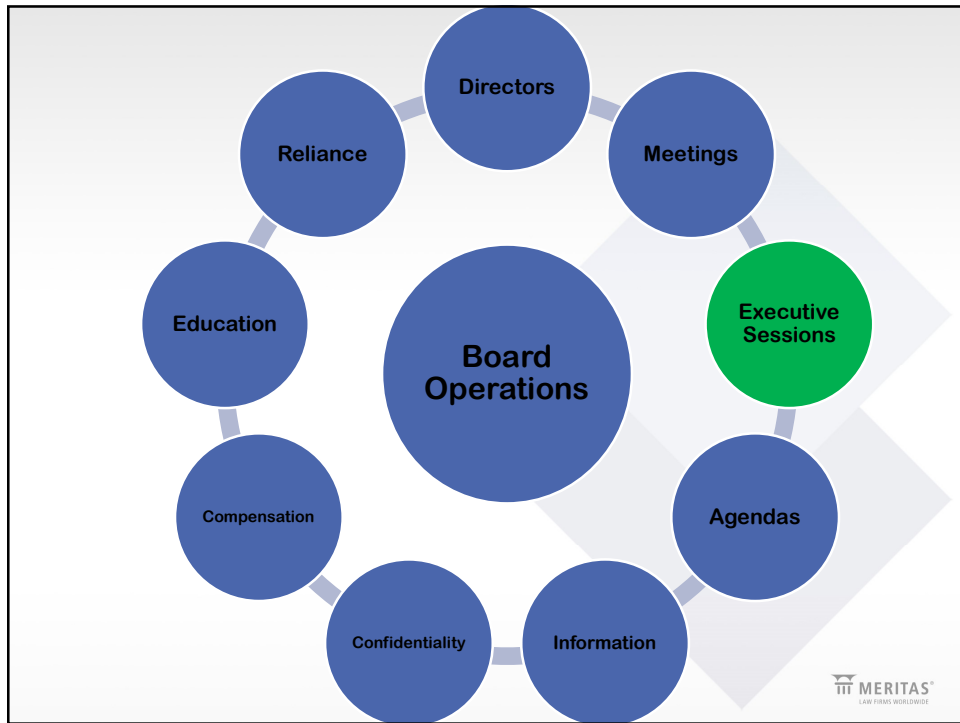
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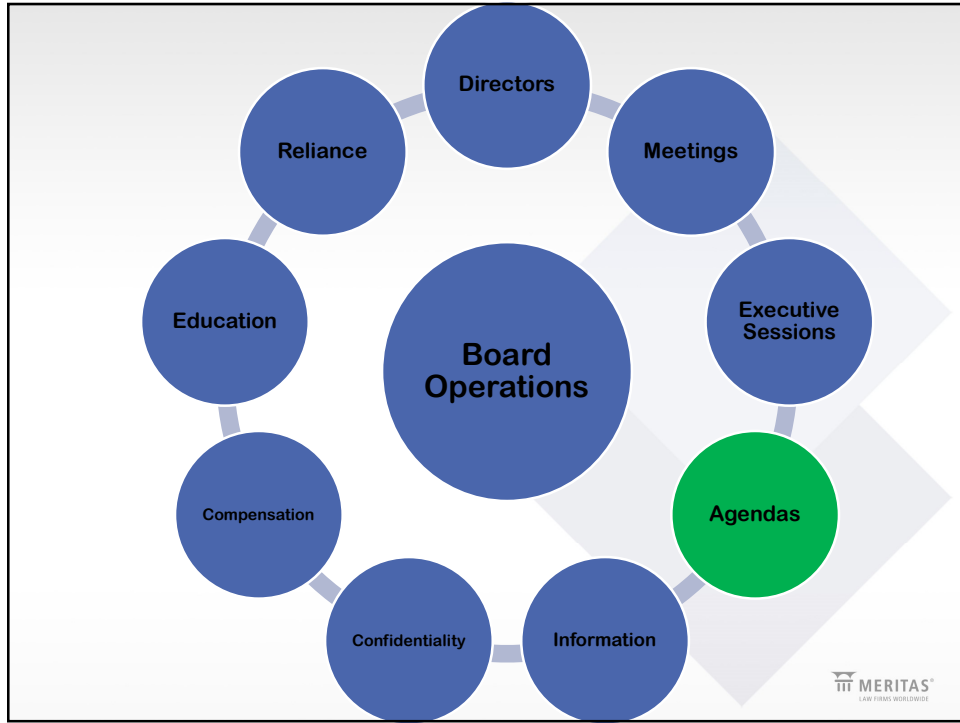
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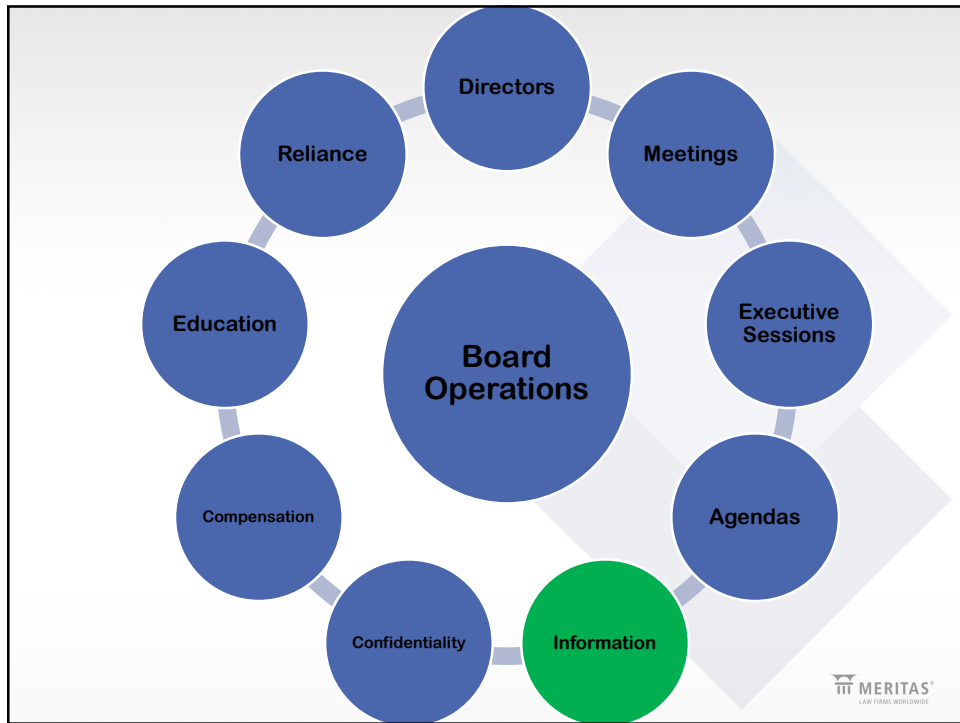
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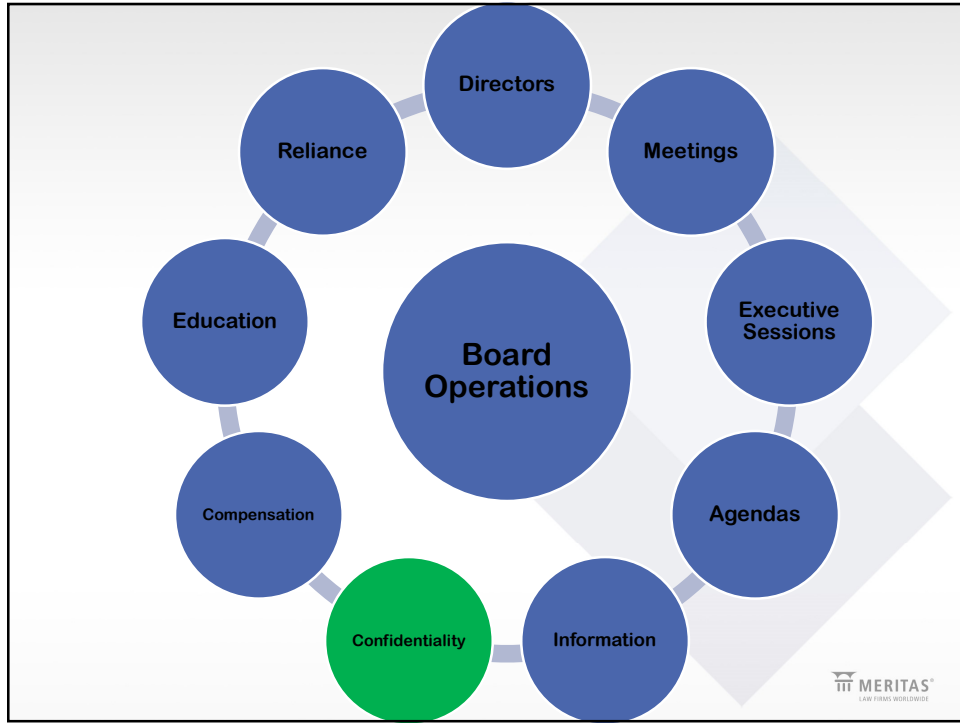
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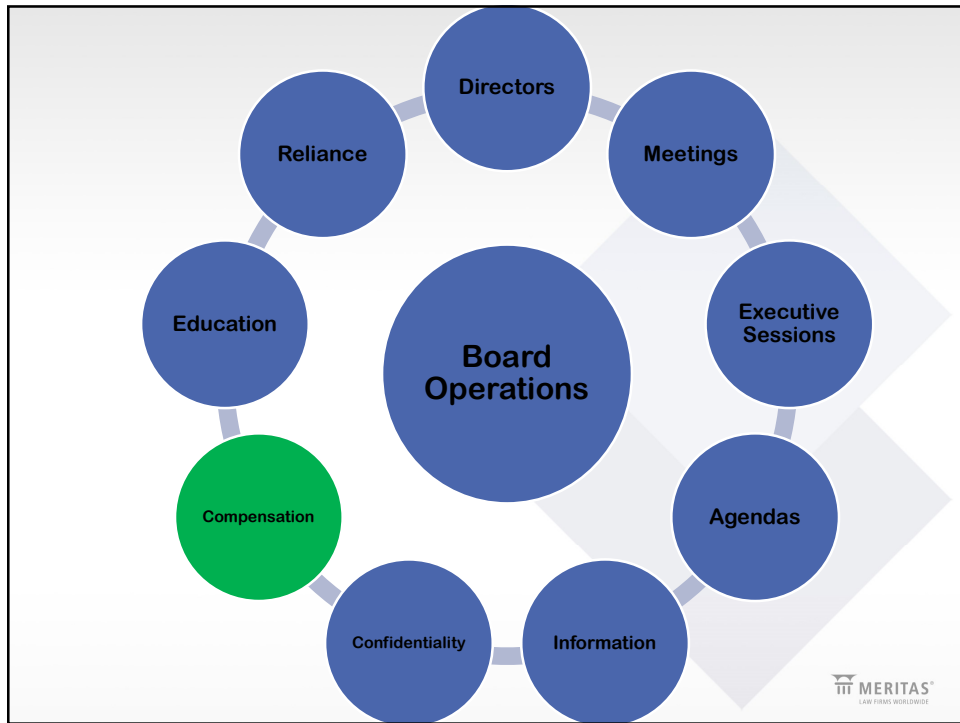
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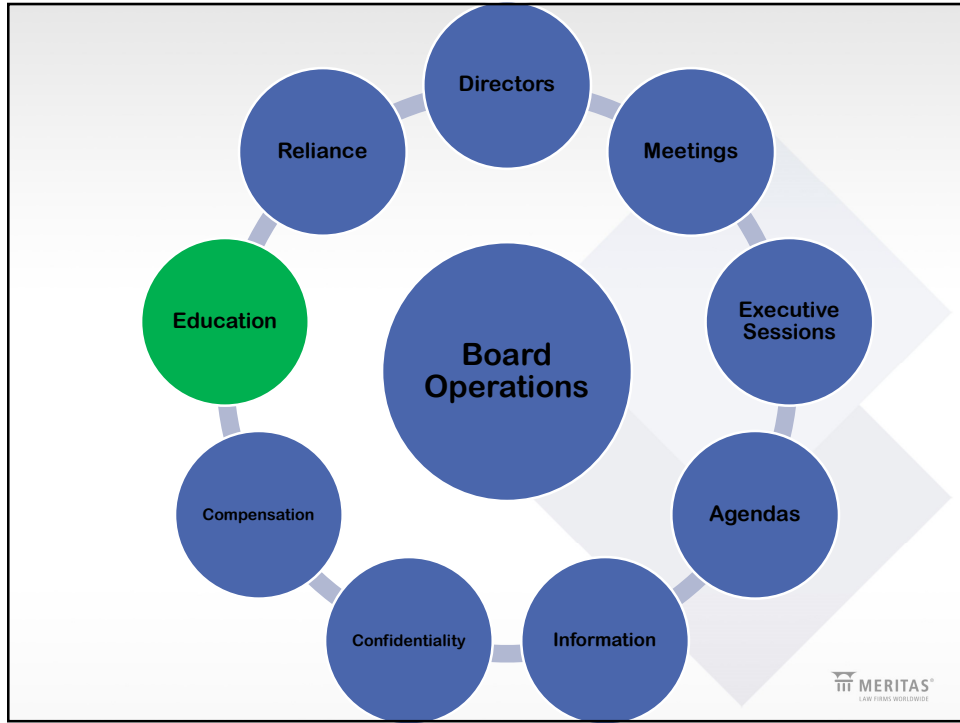
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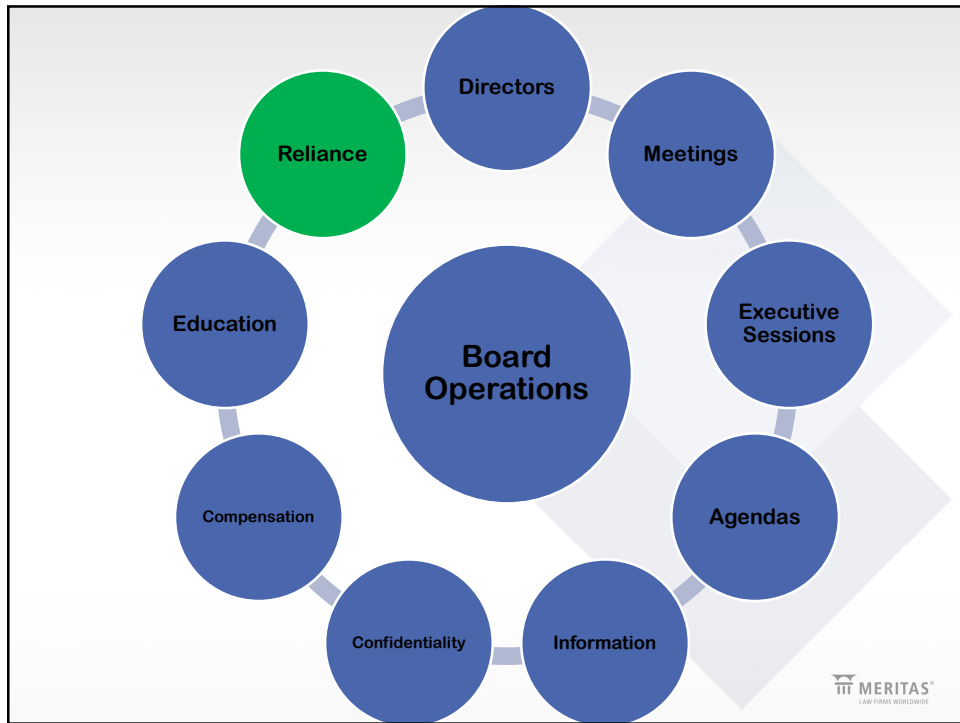
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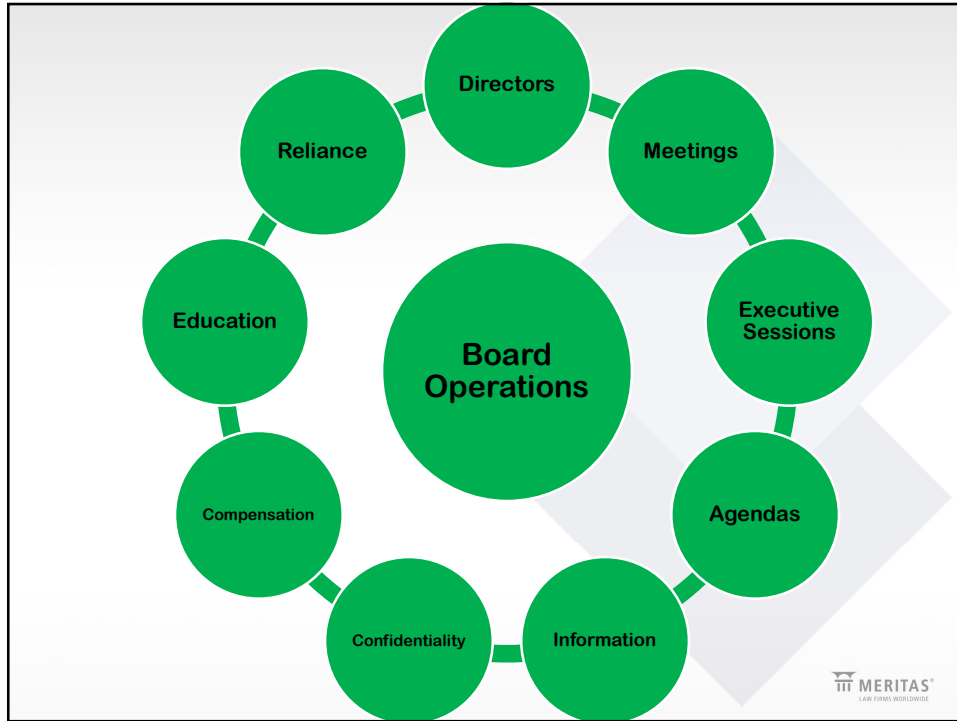
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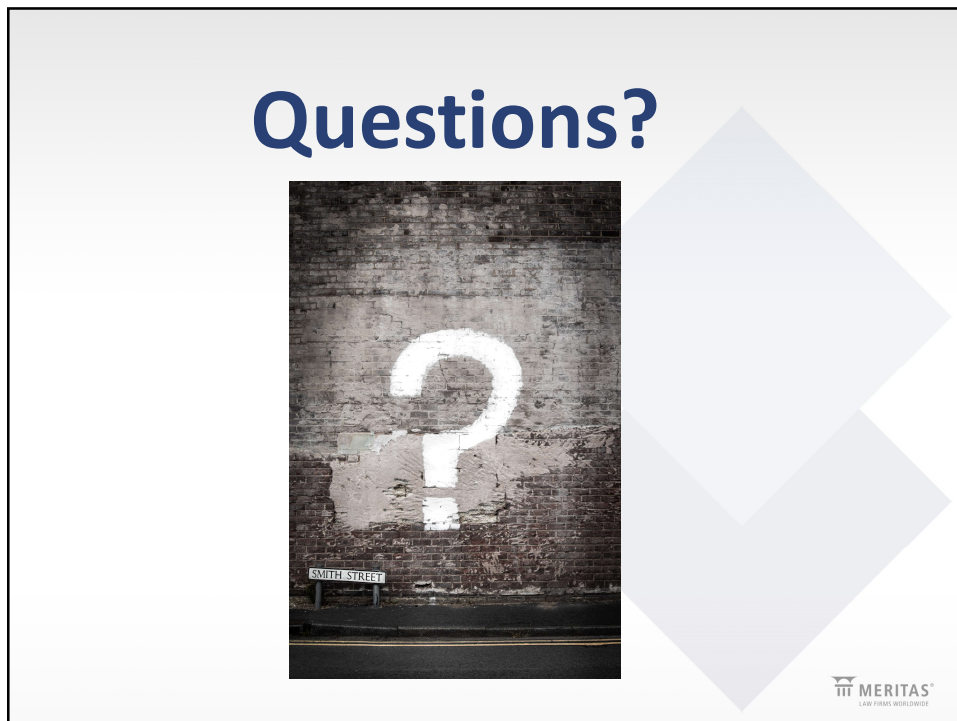
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Amy Ebeling
aebeling@ruderware.com



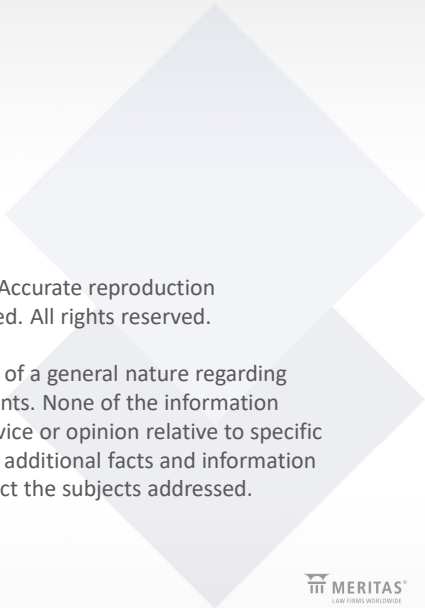
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Attorney

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Services

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[Mergers & Acquisitions](#)
[Taxation](#)
[Estate Planning](#)
[Business Succession Planning](#)
[Fiduciary Services](#)
[Business Ownership Disputes](#)
[Tax Exempt Organizations](#)

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- Complex reorganizations and spin-offs that may be required for effective and efficient business transfers.

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[COVID-19](#)
[Business Recovery](#)

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CIVIC ACTIVITIES

- **B.A. & Esther Greenheck Foundation** – Board Member (2023 – Present)
- **Community Partners Campus, Inc.** – Board Member (2020–present)
- **Good News Project** – Volunteer (2013)

- **UW-Marathon County** – Volunteer Income Tax Assistance (VITA) Volunteer (2012–2013)
 - **UW Alumni Wausau Chapter** – Board Member (2014–2017)
 - **YWCA Foundation of Wausau** – Board Member, Treasurer (2013–2016)
 - **YWCA Task Force** – Member (2014)
 - **Wausau Curling Club** – Member (2014–2021); Rookie Clinic Co-Chair (2015–2021); Golf Outing Committee Member (2015–2021); Volunteer Instructor (2014–2021); Board Member (2019–2021)
-

PROFESSIONAL ACTIVITIES

Partnership for Progressive Agriculture – Board Member (2016–present)

Education

- B.A., University of Wisconsin – Madison (2005)
 - J.D. (*cum laude*), University of Wisconsin Law School – Madison (2008)
 - LL.M. in Taxation, New York University School of Law – New York, NY (2009)
-

Admissions

- Illinois Supreme Court
- Iowa Supreme Court
- New Jersey Supreme Court
- New York Supreme Court
- Wisconsin Supreme Court
- U.S. District Court for the Western District of Wisconsin
- United States Tax Court

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Nonprofits & Foundations

Nonprofits and exempt organizations are focused on delivering upon their mission, however complicated regulations dictate every structure of their life-cycle.

It's crucial nonprofits know how to stay in compliance with government rules and regulations. Our attorneys understand the important work these organizations provide and realize they can ease the burden of compliance.

We work with public charities, private foundations, social service organizations, and family trusts from their inception – preparing organizational documents and tax exempt applications – through ongoing maintenance and daily operations.













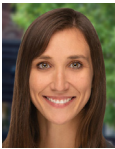









Services offered by Ruder Ware:

- Incorporation and corporate structures
- Nonprofit board governance
- Mandatory filings
- IRS issues
- Tax-exemption applications
- Legal audits
- Charitable solicitation registration
- State and local tax matters
- Charitable gifts and fundraising
- Unrelated business income tax (UBIT)
- Employment
- Investment and endowment policies
- Reasonable compensation

Our lawyers also counsel section 501(c)(3) organizations in fundraising and donor-related activities, providing advice on matters such as:

- Compliance with charitable solicitation laws
- Availability of income tax deductions for donors, and substantiation requirements
- Creation of donor advised funds, field of interest funds, and endowment funds
- Creation of charitable remainder and lead trusts
- Creation of gifts annuities and pooled income funds

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	<p>Sara Ackermann</p> <ul style="list-style-type: none"> Commercial Litigation Employment Law <p style="text-align: right;">Wausau</p>		<p>Steve Anderson</p> <ul style="list-style-type: none"> Commercial Litigation <p style="text-align: right;">Eau Claire</p>
	<p>Mark Bradley, Of Counsel</p> <ul style="list-style-type: none"> Business Succession Planning Estate Planning Fiduciary Services <p style="text-align: right;">Wausau</p>		<p>Matt Cornetta</p> <ul style="list-style-type: none"> Commercial Litigation Mediation <p style="text-align: right;">Eau Claire</p>
	<p>Ian Colby</p> <ul style="list-style-type: none"> Mergers & Acquisitions Real Estate & Construction <p style="text-align: right;">Eau Claire</p>		<p>Mykayla Dado</p> <ul style="list-style-type: none"> Agriculture Estate Planning <p style="text-align: right;">Eau Claire</p>
	<p>Linda Danielson</p> <ul style="list-style-type: none"> Agriculture Business Organizations Estate Planning <p style="text-align: right;">Eau Claire</p>		<p>Amy Ebeling</p> <ul style="list-style-type: none"> Agriculture Business Transactions Estate Planning Tax Law <p style="text-align: right;">Wausau</p>
	<p>Stew Etten, Of Counsel</p> <ul style="list-style-type: none"> Banking & Financial Institutions Bankruptcy & Creditors' Rights <p style="text-align: right;">Wausau</p>		<p>Dave Fenlon</p> <ul style="list-style-type: none"> Business Organizations Estate Planning Real Estate <p style="text-align: right;">Green Bay</p>
	<p>John Fisher, CHC, CCEP</p> <ul style="list-style-type: none"> Health Care <p style="text-align: right;">Wausau</p>		<p>Anne Flinchum</p> <ul style="list-style-type: none"> Commercial Litigation <p style="text-align: right;">Green Bay</p>
	<p>Ashley Hawley</p> <ul style="list-style-type: none"> Agriculture Estate Planning <p style="text-align: right;">Wausau</p>		<p>Eric Johnson</p> <ul style="list-style-type: none"> Commercial Litigation <p style="text-align: right;">Wausau</p>
	<p>Melissa Kampmann</p> <ul style="list-style-type: none"> Business Succession Planning Estate Planning Fiduciary Services <p style="text-align: right;">Wausau</p>		<p>J.P. La Chapelle</p> <ul style="list-style-type: none"> Business Organizations Business Succession Planning Estate Planning <p style="text-align: right;">Wisconsin Rapids</p>
	<p>Emilu Larson</p> <ul style="list-style-type: none"> Banking & Financial Institutions Business Organizations Commercial Contracts <p style="text-align: right;">Eau Claire</p>		<p>John Leary</p> <ul style="list-style-type: none"> Agriculture Banking & Financial Institutions Bankruptcy & Creditors' Rights <p style="text-align: right;">Eau Claire</p>
	<p>Chad Levanetz</p> <ul style="list-style-type: none"> Commercial Litigation <p style="text-align: right;">Green Bay</p>		<p>Steve Lipowski</p> <ul style="list-style-type: none"> Agriculture Commercial Contracts Intellectual Property <p style="text-align: right;">Wausau</p>
	<p>Andrew Lorenz</p> <ul style="list-style-type: none"> Banking & Financial Institutions Commercial Litigation Real Estate & Construction <p style="text-align: right;">Eau Claire</p>		<p>Ron Metzler, Of Counsel</p> <ul style="list-style-type: none"> Banking & Financial Institutions Real Estate <p style="text-align: right;">Green Bay</p>

	<p>Joe Mella</p> <ul style="list-style-type: none"> • Agriculture • Health Care • Mergers & Acquisitions • Real Estate & Construction 	Wausau		<p>Jessica Merkel</p> <ul style="list-style-type: none"> • Agriculture • Elder Law 	Wausau
	<p>Paul Mirr</p> <ul style="list-style-type: none"> • Mergers & Acquisitions • Real Estate & Construction 	Eau Claire		<p>Joe Mirr, Of Counsel</p> <ul style="list-style-type: none"> • Mergers & Acquisitions • Real Estate & Construction 	Eau Claire
	<p>Mark Munson, CELA</p> <ul style="list-style-type: none"> • Elder Law 	Wausau		<p>Brick Murphy</p> <ul style="list-style-type: none"> • Business Organizations • Mergers & Acquisitions • Real Estate & Construction 	Green Bay
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	<p>Derek Prestin</p> <ul style="list-style-type: none"> • Intellectual Property • Real Estate & Construction 	Eau Claire		<p>Eric Preu</p> <ul style="list-style-type: none"> • Business Organizations • Business Succession Planning • Estate Planning 	Wisconsin Rapids
	<p>Ruth Ross</p> <ul style="list-style-type: none"> • Estate Planning 	Wausau		<p>Matt Rowe</p> <ul style="list-style-type: none"> • Banking & Financial Institutions • Corporate Finance & Securities • Mergers & Acquisitions 	Wausau
	<p>Mary Ellen Schill</p> <ul style="list-style-type: none"> • Agriculture • Employee Benefits & Executive Compensation • Employment Law 	Wausau		<p>Jake Schraeder</p> <ul style="list-style-type: none"> • Corporate Contracts • Mergers & Acquisitions 	Wausau
	<p>Paul Schlindwein, Of Counsel</p> <ul style="list-style-type: none"> • Corporate Finance & Securities • Mergers & Acquisitions 	Wausau		<p>Lucas Sczygelski</p> <ul style="list-style-type: none"> • Corporate Contracts • Mergers & Acquisitions 	Wausau
	<p>Chris Seelen</p> <ul style="list-style-type: none"> • Agriculture • Banking & Financial Institutions • Bankruptcy & Creditors' Rights 	Eau Claire		<p>Nicole Stangl</p> <ul style="list-style-type: none"> • Employment Law 	Wausau
	<p>Jordan Sundell</p> <ul style="list-style-type: none"> • Business Organizations 	Green Bay		<p>Bill Tehan, Of Counsel</p> <ul style="list-style-type: none"> • Business Organizations • Commercial Contracts 	Wausau
	<p>Jeremy Welch</p> <ul style="list-style-type: none"> • Banking & Financial Institutions • Bankruptcy & Creditors' Rights 	Wausau		<p>Shanna Yonke</p> <ul style="list-style-type: none"> • Estate Planning • Fiduciary Services • Business Succession Planning 	Wausau

Our Services

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- Appeals
- Asset Protection Planning
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- Bankruptcy & Creditors' Rights
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- Business Organizations
- Business Ownership Disputes
- Business Risk Analysis & Risk Management
- Business Succession Planning
- Commercial Contracts
- Corporate Finance & Securities
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- Elder Law
- Employee Benefits & Executive Compensation
- Employment Contracts & Independent Contractor Agreements
- Employment Litigation
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- Estate, Trust & Fiduciary Litigation
- Fiduciary Services
- Handbook Policy Development & Audits
- Health Care Litigation
- Human Resources Counseling
- Intellectual Property
- Mediation
- Medical Assistance & Long-term Care Planning
- Mergers & Acquisitions
- Probate & Trust Administration
- Real Estate & Construction
- Real Estate & Construction Litigation
- Small Business/Business Start-up
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