



Marcia L. Mueller

Partner
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Marcia Mueller concentrates her practice in the areas of estate planning, tax qualified retirement benefit plans governed by ERISA, non-qualified deferred compensation plans, organization and operation of charitable trusts and foundations, tax-related matters and financial planning projects.

Ms. Mueller also handles aspects of corporate representation, including helping her clients structure and create appropriate operating entities and advising closely held businesses in the area of succession planning.

Professional Background

Ms. Mueller is the leader of Hinshaw's Estate Planning Practice Group. She has completed several significant senior financial training programs and holds related professional certifications. She graduated with honors from the American Bankers Association's National Graduate Trust School at Northwestern University, and has been awarded the designation of Certified Retirement Plan Specialist (CRPS). Ms. Mueller also completed the Certified Financial Planner Professional Education Program through the College for Financial Planning, Denver, Colorado, in 1998.

Prior to joining Hinshaw in November 1995, Ms. Mueller was a Vice President and Trust Officer with First of America Trust Company, and had been designated Regional Employee Benefit Specialist. While working in the trust industry Ms. Mueller had more than 16 years of trust administration experience, which encompassed administering a variety of qualified retirement plans, including ESOPs, 401(k) Plans, other Defined Contribution Plans, Defined Benefit Plans, IRAs, personal trusts, and estates.

Professional Affiliations

- American Bar Association
 - Taxation Section
 - Real Property
 - Probate and Trust Law Section
 - Labor and Employment Law Section
- Illinois Bar Association

Practices

Business Formation
Employee Benefits
Employee Stock Ownership Plans (ESOPs)
Estate Planning & Wealth Preservation
Tax

Education

J.D., *with distinction*, University of Illinois Chicago School of Law (formerly The John Marshall Law School), 1978

- Member, the Order of John Marshall and the Gavel Society

B.A., University of Missouri, 1975

Admissions

Illinois

U.S. District Court for the Northern District of Illinois



- Business Advice and Financial Planning Section
- Elder Law Section
- Trusts and Estates Section
- Federal Taxation Section
- Employee Benefits Section
- Winnebago County Bar Association
 - Estate Section
- Employee Benefits Association of Northern Illinois

Honors & Awards

- *Leading Lawyers Magazine* "Top" lists honors include:
 - 2019: Top 10 Downstate Trust, Will & Estate Planning Lawyers, Top 100 Downstate Consumer Lawyers, Top 100 Downstate Leading Lawyers, Top 100 Women Consumer Lawyers
 - 2018: Top 100 Downstate Leading Lawyers, Top 100 Women Consumer Lawyers
 - 2017: Top 100 Downstate Leading Lawyers, Top 100 Women Consumer Lawyers
 - 2016 Consumer Edition: Top 100 Downstate Consumer Lawyers, Top 100 Women Consumer Lawyers
 - 2015 Women's Edition: Top 10 Women Downstate Illinois Lawyers, Top 50 Women Downstate Illinois Lawyers
 - 2013 Consumer Edition: Top 100 Downstate Consumer Lawyers, Top 100 Women Consumer Lawyers
 - 2012 Women's Edition: Top 10 Women Downstate Illinois Lawyers, Top 50 Women Downstate Illinois Lawyers, Top 100 Women Lawyers in Illinois, Top 100 Women Consumer Lawyers in Illinois
 - 2011 Consumer Edition: Top 50 Women Consumer Lawyers in Illinois, and Top 50 Downstate Illinois Consumer Lawyers
 - 2010 Women's Edition: Top 10 Women Downstate Illinois Lawyers, Top 50 Women Downstate Illinois Lawyers, Top 100 Women Consumer Lawyers in Illinois
 - 2009 Consumer Edition: Top 50 Women Consumer Lawyers in Illinois
 - 2009 Women's Edition: Top 10 Women Downstate Illinois Lawyers Downstate, Top 100 Women Consumer Lawyers in Illinois
 - 2008: Top 50 Leading Women Consumer Lawyers in Illinois
 - 2007: Top 50 Leading Women Lawyers in Illinois in all areas of law
 - Recognized by her peers as a "Leading Lawyer" in the categories of Employee Benefits Law and Trusts, Wills & Estate Planning Law
 - Subject of a profile, "Tax, Estate Clients Benefit from Her Laser Focus," in the November 2010 Women's Edition, of *Leading Lawyers Network Magazine*
- Rated by Martindale-Hubbell for ethics and legal ability
- Recognized as a "Super Lawyer" by *Illinois Super Lawyers* magazine, 2005

Presentations

- "Working With Professional Advisors Using a Philanthropic Planning Model," Moderator, Association of Fundraising Professionals, Rockford, Illinois, November 2014
- "Provide and Protect, Important Life and Death Decisions," for Christ United Methodist Church, Rockford, Illinois, August 2014
- "A to Z for Bank ESOPs," CBAI CEO Forum, Illinois, November 2013



- "ESOPs from A to Z," U.S. Trust, Bank of America, Private Wealth Management, Chicago, Illinois, October 2013
- "A to Z for Bank ESOPs," CBAI's 39th Annual Convention & Expo, Springfield, Illinois, September 2013
- "Charitable and Planned Giving Issues," Northern Illinois Center for Non-Profit Excellence's "Legally Speaking" seminar, Rockford, Illinois, April 2012
- "2010 Tax Relief Act," Savant Capital Management, Inc., Estate Planning Roundtable Discussion, Rockford, Illinois, March 2011
- "Current Estate Planning Issues (Including How to Prevent the IRS or Other 'Undesirables' from Being your Primary Beneficiaries)," Hinshaw's 2005 Breakfast Seminar Series, Rockford, Illinois, April 2005

Publications

- "Charitable Gift Policies: Not All Gifts Are Good – Just Ask the Trojans," *The Voice*, Rockford Chamber of Commerce, July 2012
- "Retirement Plans and IRAs," chapter author, "Postmortem Estate Planning," Illinois Institute for Continuing Legal Education, 2014 and 2010 edition

Community/Civic Activities

- Laurent House Foundation, Inc., a house museum featuring a Frank Lloyd Wright designed home in Rockford, Illinois, Member of the Board of Directors
- Rockford Symphony Orchestra Foundation, Member of the Board of Directors
- Rockford Police Pension Board, Trustee by Mayoral Appointment
- Rockford East Cherry Valley Rotary Club
- Rockford Chamber of Commerce Lead 360, a group of woman business leaders, Member
- Northern Illinois Planned Giving Council, Past Member of the Board of Directors
- Rockford Symphony Orchestra, Past Board Member
- Greenwich Village Art Fair, a benefit for the Rockford Art Museum, Steering Committee, Past Member
- Klehm Arboretum & Botanic Garden, Served on the Board of Directors
- Honored with Klehm's President's Award – Certificate of Appreciation for her hours of commitment and service, 2010
- New American Theater, Served on Board of Directors
- P.H.A.S.E. Incorporated (now known as Remedies, Inc.), Served on the Board of Directors
- Wesley Willows Corporation, Served on the Board of Directors