



Succession Planning Workshop for Door County Business Owners

Baileys Harbor Town Hall – Tuesday, October 20th, 8am-12pm

Speaker Bios

Richard Hauser – Pinkert Law Firm



Education/Licensing: University of Wisconsin Law School, J.D., 1987; University of Wisconsin, BBA, 1983. **Member:** State Bar of Wisconsin; Door County Bar Association; American Bar Association.

Richard Hauser's practice focuses on estate planning, elder law, estate administration, corporate succession strategies, probate, and not-for-profit law. Clients ranging from individuals to entire multi-generation families turn to Dick for help in planning their wills, powers of attorney and structuring their estates to ensure that their loved ones will be protected after they pass away. Dick helps business owners structure corporate succession plans that will transfer family wealth to the next generation with minimal tax consequences. He also advises property owners who wish to transfer family vacation properties to their children's families as seamlessly as possible. He is a board member of Ministry Door County Medical Center Foundation, Door County Maritime Museum, Door County Community Foundation, Crossroads at Big Creek, St. Joseph Church Finance Committee and the UW Alumni Club of Door County.

Vicki Stangel – Stangel Accounting and Tax Office



Vicki Stangel, CPA is the founding owner of Stangel Accounting and Tax Office, S.C. Her areas of emphasis are estate planning, financial planning and tax planning. Vicki graduated from St. Norbert College in 1975 with a Bachelor of Arts Degree in Accounting. After two years in private accounting Vicki entered public accounting. In 1980 she was licensed to practice as a Certified Public Accountant in the State of Wisconsin and has operated her own accounting firm since 1981. She is a member of the American Institute of Certified Public Accountants and Wisconsin Institute of Certified Public Accountants. Her areas of expertise include financial statements, individual and business taxes, tax planning and consulting including buying and selling of a business, social security planning, financing alternatives, forecasts and projections. Additionally, Vicki values historical preservation. In the 1980's, she purchased the dilapidated Carnegie Library and has restored it to a nationally registered historic building.

Tara DuBois – Stangel Accounting and Tax Office



Tara DuBois, CPA, CVA is the Office Manager of Stangel Accounting and Tax Office, S.C. with over 10 years of public accounting experience. She also is the only professional in Door County that has been accredited as a CVA (Certified Valuation Analyst). Tara graduated from University of Wisconsin Green Bay with a Bachelor of Business Administration in Accounting and Business Management. She is a member of the American Institute of Certified Public Accountants and National Association of Certified Valuators and Analysts. Her areas of expertise include individual and business taxes; estate, gift and trust taxes; QuickBooks and financial statements; business valuations; and tax planning and consulting including buying and selling of a business. Tara is also involved in her community serving as a member of various boards and committees.

Jennifer Moeller – County of Door Register in Probate



Jennifer Moeller has been a member of the State Bar of Wisconsin since 1994. She began her practice of law in Milwaukee working first for a corporation of automobile dealerships and then in a small law firm. She moved to Door County in 1999 joining an established law firm and continuing as a general practitioner in Door County, concentrating in the areas of family law, real estate and probate. In February 2011, the Door County Circuit Court Judges appointed Ms. Moeller to serve in the newly combined position as Family Court Commissioner and Register in Probate. Ms. Moeller is involved with various non-profit organizations that serve

Door County residents. She has been involved in local government.

Bob Wolter – Creative Business Services/CBS-Global, LLC



Bob Wolter joined Creative Business Services in 2006 with 20 years of experience operating his own advertising and marketing business in Chicago, assisting large and small companies alike with their advertising and marketing programs. With nearly 10 years of Business Brokerage and Mergers & Acquisitions experience, Bob has had the opportunity to assist numerous business owners with the most important transactions that they will ever undertake. He is widely recognized by his peers as a very professional and thorough executive and is known for his ability to get the deals done. He works closely with professional advisors as part of a team with one objective in mind...the client's. Bob's areas of interest include manufacturing, distribution and service, with an

emphasis on both the cheese and dairy industry and the staffing and temporary employment industry.

Mike Schwantes – Creative Business Services/CBS-Global, LLC



In 1979, Mike founded CBS-Global LLC as a business intermediary. Through a careful consideration of all essential components involved in a successful transition, Mike is able to deliver consistently superior results to his clients around the world. These results are fueled in part by a customized marketing strategy utilizing state-of-the-art resources to effectively represent buyers and sellers alike. His areas of expertise include real estate investment, conversions, and the 1031 Starker Exchange. Mike's specific areas of specialization are M&A and manufacturing/distribution firms including transportation companies. Mike is a member of the International Business Broker's Association, M&A Source, Midwest Business Brokers and Intermediaries, the National Association of Realtors, Wisconsin Realtors Association, Commercial Association of Realtors

Wisconsin, New North, Wisconsin Cheese Makers Association, Wisconsin Specialty Cheese Institute, Wisconsin Association of Staffing Services and the American Staffing Association. He is a graduate of University of Wisconsin-Stout.

Tony Goebel – 5Gbenefits, LLC



Tony Goebel is the owner/founder of 5Gbenefits. He leads a team of 10 people and is a benefits expert throughout Northeast Wisconsin. 5Gbenefits has expanded to physical locations in Green Bay, Appleton, Oshkosh and Fond du Lac, with 5G partners in Milwaukee and Sheboygan. The firm provides insurance and benefits products as well as consulting on HR, safety and wellness. Tony is an avid outdoorsman and loves to hunt, fish, camp, play golf, cards, volleyball, and hang out with family and friends. He has always been extremely active with community involvement as well. He graduated Summa Cum Laude from the University of Wisconsin-Oshkosh with a Bachelor of Business Administration degree in Marketing and minors in Entrepreneurship and Financial Services.