



WAGNER OEHLER, LTD.

Legal & Title Services

*guiding you through life's **most crucial** legal decisions*

Winter 2022

(507) 288 - 5567

*Serving clients
throughout
Southeastern
Minnesota in our
Rochester, Winona,
and St. Charles
offices.*

Rochester

1801 Greenview Drive SW
Suite 102
Monday – Thursday
8:30– 4:30 p.m.
Friday
8:30 a.m. – 3:30 p.m.

Winona

165 Johnson Street
Monday – Thursday
8:30 a.m. – 4:30 p.m.
Friday
8:30 a.m. – 3:30 p.m.

St. Charles

819 Whitewater Avenue
Tuesdays and Thursdays
By Appointment



Our Winona Office is Open

The Winona Area Chamber Ambassadors were honored to help Wagner Oehler, Ltd. celebrate the grand opening of their new office in Winona yesterday with a ribbon cutting!

"The attorneys and staff at Wagner Oehler, Ltd. look forward to providing the same the level of service which the clients received from Steve and Eric," said Jason Wagner, President of Wagner Oehler, Ltd. "Having served clients in Winona County for over forty years, and having had an office in Winona County since 2018, we are familiar with many of the business and community leaders here already. We look forward to growing those relationships to meet the legal needs of the Winona area."

**Congratulations,
Attorney Alec S.
Osland on being
named as the Lion
Club's Melvin Jones
Fellow recipient.**

Attorney Osland is
pictured with Joe Borland
of the Lions Club.



**Welcome New
Employees!**

Ashley Christie
Legal Assistant
Winona Office

Sandy Coon
Paralegal
Rochester Office

Savannah Jones
Paralegal
Rochester Office



**Wagner Oehler,
Ltd. Announces
Alyssa K. Jerde as
New Partner**

Congratulations, Attorney Jerde!

Wagner Oehler, Ltd. is proud to announce Alyssa K. Jerde as Partner in the firm. Attorney Jerde became an associate with the firm in 2017 and has continued her leadership role as the firm's Vice President and lead attorney at the Winona office. In addition, Alyssa has been diligent in promoting the mission, vision, and values of the firm and representing our firm positively in our client community. Alyssa Jerde assists clients with primarily with trusts and estate planning as well as business law. She works with clients to formulate an estate plan that fits their individual needs, which includes the drafting of wills, testamentary trusts, revocable trusts, irrevocable trusts, special needs trusts, powers of attorney, health care directives, and designation of guardians and conservators. She facilitates discussions for families regarding wealth preservation, transfers between generations, and strategies for philanthropic giving.

Alyssa also helps clients with business formations and legal issues generated by their business dealings, including organizational structure and internal governance, business financing, and sale and purchase transactions. Alyssa has extensive experience in both small and large real estate transactions, representing purchasers, sellers, and lenders.

When Alyssa is not assisting her clients, she is active in various civic and professional organizations, including Olmsted County Bar Association, Third District Bar Association (Past President); Legal Assistance of Olmsted County Board of Directors (Secretary, October 2020 – February 2021; Vice President, March 2021 – Current); Legal Assistance of Olmsted County's Volunteer Attorney Program (New Volunteer of the Year Award, 2019); and Women Attorneys of Rochester (co-chair). As a Partner in the firm, Alyssa continues her demonstrated leadership within our firm and the community at large.

TWO WAYS ASSETS MOVE AT DEATH

NON-PROBATE ASSETS

Non-Probate Assets are automatically transferable at death to the named beneficiaries or to a joint owner.

- insurance with a **designated beneficiary**
- retirement accounts with a **designated beneficiary**
- assets held **in trust** or directed to the trust
- bank accounts held **jointly** or with a **payable on death** designee
- business interests (stocks, membership interests, and mutual funds) with a **transfer on death designee**
- real estate owned together with survivorship rights (**joint tenants**) owned by others in which you have retained a **life estate**, or which you have recorded a transfer on death deed
- titled personal property, like a vehicle, owned together with **survivorship rights** (“or” must appear on title), or which you have registered a **transfer on death designee**.

PROBATE ASSETS

Probate Assets are held in your name only, without any beneficiary designations or rights of survivorship.

Any asset that does not say where it goes. In other words, anything that is not a “non-probate” asset. By default, these assets are owned by the “estate”.

HOW DO THE PROBATE ASSETS TRANSFER?

Small Estate: probate assets total \$75,000.00 or less and include no real estate interest. The assets are collected through an affidavit.

Informal Probate: A court process, with or without a will, and documents are approved without a court hearing.

Formal Probate: A court process, with or without a will, and documents are approved by a judge at a court hearing.

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**Upcoming Seminars presented by
Attorney Judith K. Wilson**

END OF LIFE PLANNING

March 9, 2022 at 9:00 a.m.
Cathedral of Sacred Heart | Winona

FRAUD PREVENTION

March 16, 2022 at 10:00 a.m.
St. Bernard's | Stewartville



Look for our booth at the 2022 Ag Week Farm Show on March 8th & 9th at the Graham Arena Complex in Rochester!

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Rochester, MN 55902