



Rodney S. Retzner
Partner

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Rodney Retzner is the Chair of the firm's Estate Planning and Administration Practice Group. His practice is concentrated in the areas of estate and business succession planning, estate and trust administration and estate and trust litigation. In the practice of succession planning, Mr. Retzner has worked with many closely-held family businesses in order to assist in the transition of the business to future generations with the least amount of impact as possible from taxation as well as family relationships. Mr. Retzner's practice in the area of estate planning has included work with individuals with nominal estates up to individuals with close to a billion dollars in net worth.

In more recent years, Mr. Retzner has drawn from his experience in the operations, maintenance and regulation of nuclear power plants, as well as his background in mechanical engineering to serve as a member of Krieg DeVault's Alternative Energy Industry Group, working with that Industry Group in a variety of roles involving clients in the ethanol and bio-fuels industry, as well as wind turbine farming and manufacturing.

PRACTICE AND INDUSTRY TEAMS

- Alternative Energy and Clean Tech
- Business
- Energy and Public Utilities
- Estate Planning and Personal Services
- Federal Stimulus Services
- New Markets Tax Credits
- Tax

REPRESENTATIVE EXPERIENCE

- Represented purchaser in negotiation and acquisition of a telecommunications company valued in excess of \$10 million. Following that representation, represented another client in negotiation in acquiring an additional telecommunications company of the same size in a different part of the

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state

- Responsible for the creation/transformation of a large trust holding interest in a closely-held company into a private foundation with assets in excess of \$20 million; thereby allowing for greater impact on the communities served by that company through the private foundation
- Representation in the estate and business succession planning of a successful nursing home developer with excess of \$20 million in assets and successful representation of the personal representative of the estate in transitioning the assets through estate administration and estate litigation through the ultimate beneficiaries
- Worked with various financial institutions and other creditors in the filing and prosecution of claims against deceased estates and trusts as well as against non-probate transferees, including opening estates and administering estates as a creditor and defending creditors against various asset protection devices implemented by debtors
- Worked with telecommunication clients in reviewing AARA for potential grant money for installation of broadband systems to service previously unserved areas of the State of Indiana; researching bio-fuel credits in assisting and applying funds for the manufacture facilities mixing bio-fuels with diesel fuel; as well as providing assistance and advice to the firm's clients with respect to wind farms and manufacture of wind turbine components
- Involved in litigation involving disputes with respect to will contests and trust litigation representing both plaintiffs and defendants' estate and trusts in litigation of all types related to the contest of trusts and wills as well as disputes involving distribution and other prosecution and defense of claims. Mr. Retzner has navigated clients through such disputes up to and through the Indiana Court of Appeals

EDUCATION

- University of Cincinnati College of Law, Cincinnati, Ohio (J.D., 1998)
 - Moot Court: Moot Court Board, 1996-1998; Corporate Law Fellowship, 1995-1998
- Rose-Hulman Institute of Technology, Terre Haute, Indiana (B.S. in Mechanical Engineering, *cum laude*, 1990)
- Navy Nuclear Power Program (M.S. in Nuclear Power, 1991)

BAR & COURT ADMISSIONS

- Indiana, 1998
- U.S. District Court for the Northern District of Indiana
- U.S. District Court for the Southern District of Indiana

PROFESSIONAL ASSOCIATIONS

- Indianapolis Bar Association (Member)
- Executive Council of Estate Planning and Administration Section, Indianapolis Bar Association
- Indiana State Bar (Member)
- Council of Probate and Real Property Section, Indiana State Bar Association

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- Probate Review Committee, Indiana State Bar Association
- Utilities Law Section, Indiana State Bar Association
- Indianapolis Estate Planning Council (Member)
- Fishers Chamber of Commerce
- United States Navy Reserve, Commanding Officer COMPHIBRON 8, Louisville, Kentucky
- Southeastern Program of Recreational Team Sports, Inc. (Vice President and Board of Directors)
- Fathers and Families Resource/Research Center, Inc.
- Junior Achievement of Central Indiana

AWARDS AND RECOGNITIONS

- Mr. Retzner is a Certified Estate Planning and Administration Specialist, certified by the Indiana State Bar Association's Estate Planning and Administration Specialty Certification Board
- Indiana Super Lawyers, 2009-2012
- Best Lawyers In America®, Trusts and Estates, 2010-2012
- Forty Under 40 Award Recipient - Indianapolis Business Journal
- Martindale-Hubbell AV Rating
- Stanley K. Lacy Leadership Series, Class XXVIII
- Community Quarterback Award Recipient - Indianapolis Colts
- Numerous medals and ribbons in connection with U.S. Navy
- Five Star Wealth Manager Award

SEMINARS AND PRESENTATIONS

- "Fundamentals of Will and Trust Drafting," ICLEF, 2008
- "Back to the Future: Business Succession Planning," Indianapolis Bar Association, 2006
- "How to Protect Assets During Life and Avoid Estate Tax at Death in Indiana," National Business Institute, 2005
- "Estate and Trust Planning Beyond the Acronyms," Indiana State Bar Association, 2005
- "What's New in Estate Planning & Administration & Medicaid," Indianapolis Bar Association, 2005
- "Untrustworthy Non-Probate Transfers," ICLEF, 2005
- "Private Foundations and Other Avenues of Planned Giving," Lorman Education Services, 2003
- "Charitable Wealth Transfer Techniques," Bowling Green State University, 2003
- "Estate Planning for Married Couples in an Era of Tax Uncertainty," Old National Trust Company, 2002
- "Planning Opportunities with Qualified Tuition Programs in Indiana," National Business Institute, 2002
- "Basic Will Drafting and Planning," Indiana Continuing Legal Education Forum, 2002
- "Changing from Wide Angle to Zoom Lens: Estate Planning for the Surviving Spouse," Indiana Continuing
- Legal Education Forum, 2002
- "What's New in Estate Planning," Indianapolis Bar Association, 2000, 2001, 2002

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- "Top Ten Practice Tips for Young Lawyers & General Practitioners – Estate Planning and Administration," Bank One, 2000
- "Dealing with Your Stock," Community Bankers Association of Indiana, Inc. Education Seminar, 2000

PUBLICATIONS

- "Estate Planning in a Changing Tax World," Inside the Minds: New Strategies in Estate Planning, 2008

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