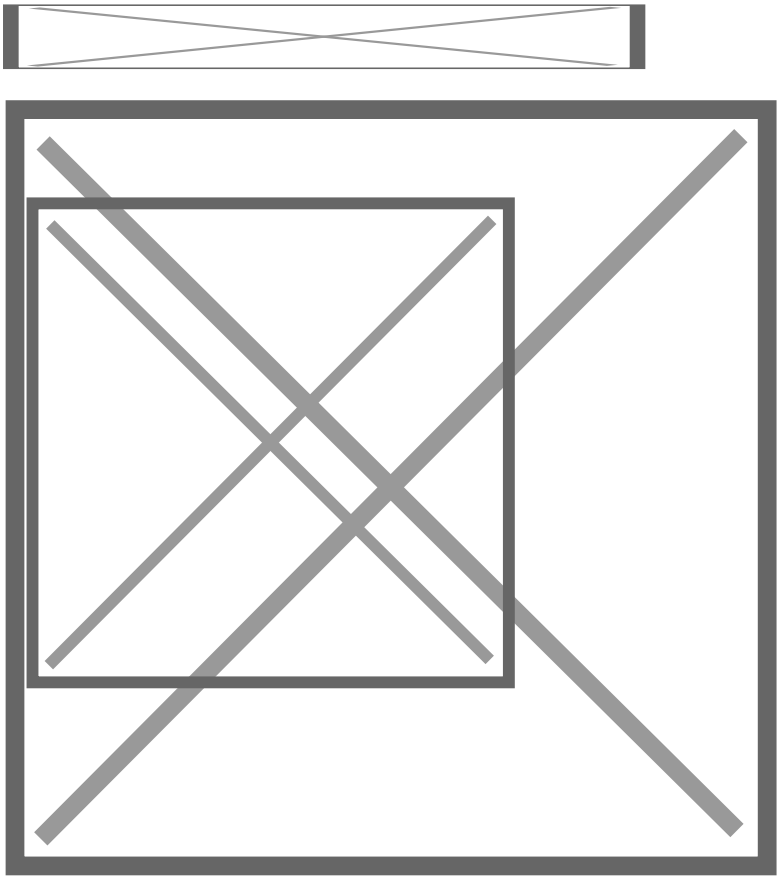

Rodney S. Retzner

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Rodney Retzner is a Partner in the firm's Estate Planning and Administration Practice. 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 over a billion dollars in net worth.

Education

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

Bar & Court Admissions

- Indiana, 1998
- U.S. District Court for the Northern District of Indiana, 1998
- U.S. District Court for the Southern District of Indiana, 1998
- Florida, 2017

Certifications

- Board Certified Indiana Trust and Estate Lawyer by Trust and Estate Specialty Board
- Legal Lean Sigma® White Belt

Practices

- Business Services
- Estate Planning and Personal Services
- Tax
- Trust and Estate Litigation
- Private Client Services

Industries

- Financial Services

Professional Associations

- American College of Trust and Estate Counsel - ACTEC (Member)
- Children's Museum of Indianapolis (Planned Giving Committee)
- Indiana University Maurer School of Law (Adjunct Professor - Trust and Estate Planning)
- 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
- Probate Review Committee, Indiana State Bar Association
- Indianapolis Estate Planning Council (Member)
- Fishers Advisory Plan Commission and Board of Zoning Appeals, legal counsel

Awards & 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, 2009-2025
- Best Lawyers® Trusts and Estates "Lawyer of the Year" in Indianapolis, 2018; 2020; 2022-2023
- The Best Lawyers in America®, 2011-2026
- Chambers USA: Leader In the Field of Private Wealth Law, 2018-2022, 2025
- 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
- United States Navy Reserve, previous Commanding Officer of several reserve units (retired 2015)

Seminars & Presentations

- Presenter, "Filing Claims in an Estate", Indiana Bankers Association Mega Conference, May 6, 2024
- Presenter, "What's New in Estate Planning", Indianapolis Bar Association, 2000-Present
- Presenter, "Estate Planning and Administration Section Annual Law Update", Indianapolis Bar Association, 2023
- Presenter, "90 Hot Tips in Estate, Trust and Probate Practice", Indiana Continuing Legal Education Form, 2021, 2022, 2023
- Presenter, “Estate Planning Strategies in Anticipation of Reduced Estate Tax Exemption", Indianapolis Bar Association, 2022
- Presenter, "

Publications

- Co-Author, "The Uses and Benefits of Irrevocable Life Insurance Trusts," The Indiana Lawyer, February 26, 2025
- Co-Author, "Wills: Indiana," Practical Law Trusts & Estates, Thomson Reuters, November 7, 2024
- Co-Author, "Signature Pages for Will and Self-Proving Affidavit (IN)," Practical Law Trusts & Estates, Thomson Reuters, November 7, 2024
- Co- Author, "Putting the PURPOSE in a Trust: Using a Purpose Trust in a Business Succession Plan", February 27, 2024
- Co- Author, "Putting the PURPOSE in a Trust: Using a Purpose Trust in a Business Succession Plan", The Indiana Lawyer, February 22, 2024
- Co-Author, "Higher Estate and Gift Tax Exemptions for 2024...But How Long Will This Last?" January 2, 2024
- Author, "Avoid Leaving an Inheritance to Someone You’ve Never Met," The Indiana Lawyer, December 6, 2023
- Co-Author, "Chasing the “Worm” – Act Now to Use the Federal Gift/Estate Tax Exemption," June 8, 2023
- Co-Author, "What to do with the Cuckoo Clock? Disposing of Tangible Personal Property in an Estate Plan," March 6, 2023
- Co- Author, "What to do with the Cuckoo Clock? Disposing of Tangible Personal Property in an Estate Plan," The Indiana Lawyer, March 1, 2023
- Author, "Transferring Florida Real Estate - Tread with Caution," October 4, 2022
- Co-Author, "Three Minute Update - Day in the Life of a Business: Will Your Business Continue to Thrive If You Do Not Survive?" March 31, 2022
- Co-Author, "Indiana’s New Advanced Health Care Directive," August 10, 2021
- Author, "Estate and Gift Taxes: Do We Bet on Red or Black (Or Green)?" May 20, 2021