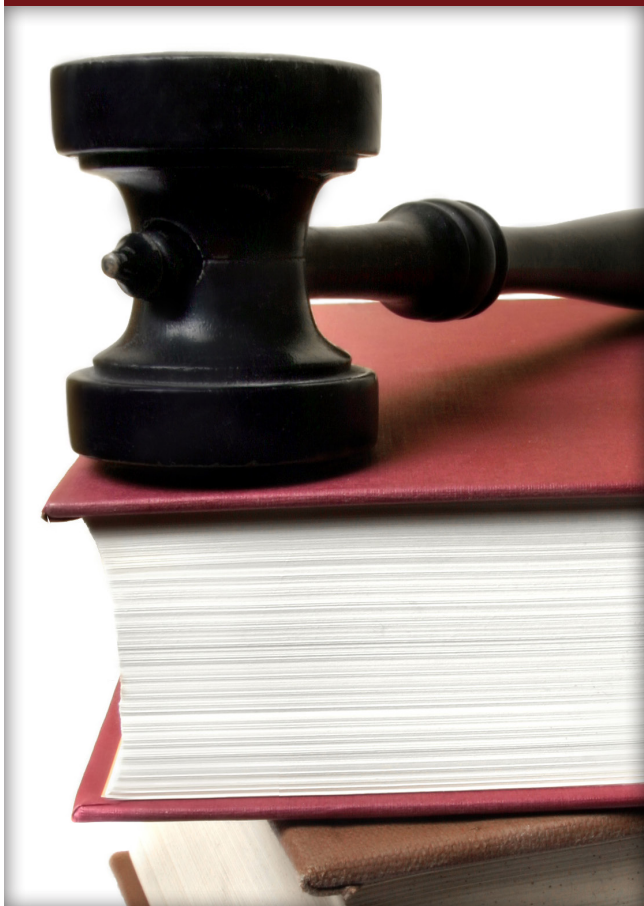


# Group Legal Service Plan



## Description of Plan

Kohler Credit Union has contracted with the law firm of **Olsen, Kloet, Gunderson & Conway** to provide legal advice and consultation to credit union members. Advice must be through an in-person conference at the offices of the law firm, or at a mutually agreeable location.

This plan is not a substitute for the retention of your own personal attorney. It is the intent of this plan to encourage the obtaining of legal advice and consultation when for reasons of anticipated expense you would not otherwise do so.

You are not required to utilize the services of the retained law firm, either for advice, consultation, or for other services. You are free to utilize any attorney of your choosing.

**IF YOU RETAIN THE FIRM FOR LEGAL SERVICES BEYOND ADVICE AND CONSULTATION, YOU SHALL BE RESPONSIBLE FOR THE COST OF SUCH SERVICE.**

If a question arises involving two credit union members and/or a conflict arises, advice and consultation shall be provided at the retained law firm's discretion.

## Special Exceptions

1. Disputes between members of Kohler Credit Union and clients represented by the retained law firm; and
2. Matters directly involving the sponsor credit union.

## Consultation Services Available

Services relating to most legal matters including personal injury, worker's compensation, family law, landlord/tenant law, real estate, creditor/debtor rights, business law and organizations, civil litigation, traffic law, consumer law, and consumer rights.

Subjects not covered include, but are not limited to: bankruptcy, patent, trademark and copyright, criminal law, securities, and anti-trust law. However, appropriate referrals for such areas can be provided, upon request.

## Limitations on Services

Preparation of documents (work product) such as agreements, deeds, tax returns, letters or legal process, and representation and negotiations or court appearances are not funded under the plan.

After completion of advice and consultation, if it is determined that additional legal services are required, the member may retain the services of Olsen, Kloet, Gunderson & Conway to proceed in the matter or retain the services of any other attorney.

Any member shall not be entitled to receive more than two (2) consultations of up to one-half hour each in any one year, on two unrelated matters per year. "Member" for this limitation means any member of the Kohler Credit Union in good standing.

The above limitations shall not be cumulative regardless of the number of plans to which the member may belong.

## Procedures in Utilizing the Plan

1. Place a call to the retained law firm in Sheboygan at (920) 458-3701, or send an email requesting same to [mail@olsenkloetlaw.com](mailto:mail@olsenkloetlaw.com). Office hours for telephonic inquiries are Monday through Friday, 8:00 a.m. to 5:00 p.m.
2. Please provide your name and credit union account number.
3. State the nature of your problem to the secretary of the law firm answering the call, who will set an appointment with an attorney.
4. At the appointment, the attorney will respond to your question and render a legal opinion to you.
5. If further legal services are recommended, the attorney will advise you to seek the services of your own personal attorney, or provide you with the opportunity to utilize the services of the retained law firm.
6. If you desire to proceed with further legal services, you may contact your personal attorney or retain the services of the advising attorney provided by the credit union.

## General Provisions

1. Eligibility shall be limited to those Kohler Credit Union members in good standing.
2. The credit union shall not be liable to the member or any other person or persons regarding any act or omission of the retained attorneys.
3. The attorneys retained shall exercise independent professional judgment and shall not engage in any misconduct or unethical behavior as defined by the rules governing the discipline of attorneys.
4. This plan may be terminated by the sponsor at any time.
5. The sponsor and any and all persons and/or entities connected with it shall not derive directly or indirectly any profit from the rendering of legal services pursuant to this plan.
6. This plan is subject to the administrative and professional regulation of the State Bar of Wisconsin.
7. Questions concerning services or fees which cannot be resolved between the credit union member and the law firm shall be submitted to arbitration pursuant to Wisconsin Arbitration Law and all parties shall be bound by the decision of the arbitrators.

*For appointments or legal services call:*

**Olsen, Kloet, Gunderson & Conway**  
602 North 6th Street, Sheboygan, Wisconsin 53081  
920.458.3701  
[mail@olsenkloetlaw.com](mailto:mail@olsenkloetlaw.com)

## Retained Law Firm

The retained law firm is **Olsen, Kloet, Gunderson & Conway**, located at 602 North 6th Street, Sheboygan, Wisconsin 53081. The Olsen, Kloet, Gunderson & Conway law firm was founded in 1963 by Arthur J. Olsen and Alvin R. Kloet, and is an AV-rated law firm by Martindale Hubbell, an independent rating service. For more information regarding the retained law firm, please visit their website at [www.olsenkloetlawfirm.com](http://www.olsenkloetlawfirm.com), or contact the firm at (920) 458-3701.

## Members of the firm include:

**James O. Conway.** Mr. Conway is a 1973 graduate of Marquette University and a 1978 graduate of Marquette University Law School. Jim's areas of practice include insurance law, probate law, business law, and civil litigation.

**Joseph J. Voelkner.** Mr. Voelkner is a 1994 graduate of the University of Wisconsin - Stevens Point and a 2000 graduate of Marquette University Law School. Joe's areas of practice include civil/commercial litigation, worker's compensation, secured transactions, creditor's rights, business/corporate organizations, insurance law, and appellate practice.

**Corrado Cirillo.** Mr. Cirillo is a 1995 graduate of the University of Wisconsin - Milwaukee and a 2001 graduate of Chicago-Kent Law School. Corrado's areas of practice include insurance law, construction litigation, and personal injury law.

**Joshua D. McKinley.** Mr. McKinley is a 2005 graduate of Hillsdale College and a 2008 graduate of William & Mary Marshall-Wythe School of Law. Josh's areas of practice include business transactions, real estate, civil litigation, estate planning, and Josh is a licensed title insurance agent.

*Building Relationships  
Strengthening Communities  
Fulfilling Dreams*

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To learn more go to **[kohlercu.com](http://kohlercu.com)**

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## LOCATIONS:

### **Sheboygan - Corporate Center**

5727 Superior Avenue

### **Kohler**

850 Woodlake Road

### **Grafton**

2550 Washington Street

### **Howards Grove**

724 Madison Avenue

### **Manitowoc - Located in Meijer**

11357 N. Port Washington Road

### **Mequon**

11357 N. Port Washington Road

### **Plymouth**

2303 Eastern Avenue

### **Saukville**

840 E. Green Bay Avenue

### **Sheboygan - Taylor Dr.**

831 S. Taylor Drive

### **Sheboygan - Financial Center**

905 S. Taylor Drive

### **Sheboygan - Located in Meijer**

924 N. Taylor Drive

### **West Bend - Located in Meijer**

2180 S. Main Street

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## **BECOME A MEMBER...**

*Kohler Credit Union membership is open to anyone who lives or works in Sheboygan, Calumet, Fond du Lac, Manitowoc, Milwaukee, Ozaukee, Washington or Waukesha County; as well as their immediate family members and associations or organizations.*



Federally insured  
by NCUA

Revised: 11/30/22