Caitlin A. Kelly

Associate

Private Wealth

Chicago Office | +1.312.902.5419

caitlin.kelly@katten.com

Caitlin Kelly focuses her practice within the trust and estate administration space, focusing on high-net-worth and ultra-high-net-worth individuals and families. She advises clients on a variety of matters surrounding the administration process, including assisting individual fiduciaries in administering trusts and estates and working with clients to ensure their goals are achieved, during and after their lives. She works closely with clients on their planning, ranging from "core" estate planning documents to more complex trusts, gifting and succession strategies.

Any successful endeavor starts with a good plan

Caitlin provides people with the support and tools to protect their assets, preserve wealth, minimize taxes and ensure stability for their loved ones while preparing for the future. The goal is to make a client feel at ease knowing that their wishes are being carried out while becoming better prepared for what life throws their way. This includes creating wealth transfer strategies and estate planning documents that are tailored to each individual client and family — including preparing and implementing revocable and irrevocable trusts, wills, powers of attorney for property and health care, life insurance trusts, gifting trusts, as well as formation and succession planning documents for family-owned businesses. She also helps clients and their families orchestrate the plans of their loved ones, including working with the family advisors to administer the planning that was put in place during the clients' lives.

Caitlin is a member of the Trusts and Estates section of the Illinois Bar Association, the Chicago Bar Association Trust Law Practice Committee, as well as a member of the Chicago Estate Planning Council.

Publications

- 2023 Year-End Estate Planning Advisory (November 20, 2023)
- Action Required: Corporate Transparency Act Reporting Is Here (November 8, 2023)
- 2022 Year-End Estate Planning Advisory (November 17, 2022)

Practices

- Business Succession Planning
- Fiduciary and Private Client Litigation
- Private Wealth

Industries

- Family Offices
- Private Client Services

Education

- JD, Loyola University Chicago School of Law
- BS, Michigan State University

Bar Admissions

- Illinois

- 2021 Year-End Estate Planning Advisory (November 22, 2021)
- Proposed Tax Legislation Would Dramatically Impact Private Wealth Planning (September 24, 2021)
- 2021 Biden Plan Estate Planning Advisory (January 15, 2021)
- 2020 Year-End Estate Planning Advisory (November 24, 2020)

Presentations and Events

- Charting a Course for Family Business Legal Leadership: GCs and Principals in Dialogue (April 16, 2024)
- Annual Katten Private Wealth & Fiduciary Seminar (October 11, 2023)
- 46th Annual National Trust Closely Held Business Association (NTCHBA) Conference | Presented by Northern Trust (September 19, 2023) | *Presenter* | *Understanding the Corporate Transparency Act*