David M. Allen

Partner

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Practices

FOCUS: Private Wealth

Business Succession Planning

Charitable Planning, Philanthropy and Nonprofit Organizations

Fiduciary and Private Client Litigation

International Private Wealth

Industries

Family Offices

Private Client Services

Education

JD, University of Michigan Law School

BA, University of Virginia

Bar Admissions

Illinois

Michigan

Community Involvements

The Chicago Bar Association

Society of Trust and Estate Practitioners (STEP)

David Allen helps high-net-worth individuals and families with all their legal needs. With an approach that seamlessly integrates estate planning, tax minimization and concierge lawyering, David's advice allows his clients to spend less time managing advisors and more time focusing on their passions, their businesses and their families.

Preserving legacies with a holistic approach

From restructuring valuable art collections to coordinating legal services for multibillion-dollar family businesses and family offices, David is often the first and only phone call his clients need to make. His clients live around the world and include private business owners, corporate executives, hedge fund managers and private equity principals.

Former professor at John Marshall Law School, David taught a course on estate and gift tax law, and he is a frequent speaker on estate and tax planning related topics, including pre-business sale tax and estate planning, international trust and estate planning, income taxation of trusts, ethical tax planning, trust decanting and estate planning with digital assets. David is also vice chair of the Society of Trust and Estate Practitioners (STEP) Chicago Branch.

Recognitions

- *Best Lawyers in America*
  - Trusts and Estates, 2018–2021
- Leading Lawyers Network
  - Emerging Lawyer, 2015

News

- Katten Attorneys Distinguished as Top Legal Talent in the 2021 *Best Lawyers in America* and *Best Lawyers: Ones to Watch* Lists (August 20, 2020)
- David Allen Discusses Sophisticated Estate Planning Strategies in Verit Advisors Article (September 2015)
- Partner David Allen Interviewed by *Forbes* on Estate Planning for Middle-Market Business Owners (March 16, 2015)
- Katten Names Sixteen New Partners in Five Practice Areas (August 5, 2014)
- Katten Honors Eight Attorneys With Pro Bono Service Awards (July 20, 2012)

Publications

- 2021 Biden Plan Estate Planning Advisory (January 15, 2021)
- 2020 Year-End Estate Planning Advisory (November 24, 2020)
- Looking Beyond the COVID-19 Crisis (March 23, 2020)
- 2019 Year-End Private Wealth Advisory (November 25, 2019)
- Katten Team Publishes 2018 Year-End Estate Planning Series (December 4–7, 2018)
- 2018 Year-End Estate Planning Advisory (November 19, 2018)
- Sweating The Small Stuff: Pre- and Post-Liquidity Event Planning For Business Owners (August 2018)
- The Tax Cuts and Jobs Act: Gift, Estate and Generation-Skipping Transfer Tax Reform (February 28, 2018)
- 2017 Year-End Estate Planning Advisory (November 20, 2017)

- 2016 Year-End Estate Planning Advisory (November 21, 2016)
- 2015 Year-End Estate Planning Advisory (November 23, 2015)
- Eight Key Estate Planning Opportunities Arising from the Supreme Court's Decision on Same-Sex Marriage (June 29, 2015)
- 2014 Year-End Estate Planning Advisory (November 26, 2014)
- 2013 Year-End Estate Planning Advisory (November 2013)
- Estate Planning Opportunities Arising from Recent Revenue Ruling Concerning Marriages of Same-Sex Couples (September 3, 2013)
- Estate Planning Opportunities Arising from Recent Landmark Supreme Court Decisions Concerning Marriages of Same-Sex Couples (June 28, 2013)
- Estate Planning After the Fiscal Cliff Deal (January 16, 2013)
- 2012 Year-End Estate Planning Advisory (November 20, 2012)
- 2011 Year-End Estate Planning Advisory (November 23, 2011)
- House Votes 277-148 to Approve Senate Tax Cut Extension Bill (December 17, 2010)
- 2010 Year-End Estate Planning Advisory (November 2010)
- 2010 Estate Tax Planning Strategies—Once-in-a-Lifetime Opportunities vs. Potential Traps for the Unwary (September 21, 2010)
- HIRE Act Affects Foreign Trusts and Imposes Additional Requirements on US Persons with Foreign Accounts (March 24, 2010)
- US Government Acts Quickly to Help Haiti with Tax Benefits for Donors (February 2, 2010)
- Hooray, There's No Estate Tax: Now What Do I Do? (January 7, 2010)
- Possible One-Year Elimination of Estate and Generation-Skipping Transfer Tax in 2010: Going, Going, Gone? (December 23, 2009)
- 2009 Year-End Estate Planning Advisory (December 2009)
- Illinois Passes State QTIP Legislation—Does Your Estate Plan Need to Be Updated to Take Advantage? (September 28, 2009)

- Changes to New York Powers of Attorney Effective September 1 (July 28, 2009)
- 2008 Year-End Estate Planning Advisory (December 2008)
- New Expatriation Legislation Passed Unanimously by Congress and Signed by President (June 2008)

Presentations and Events

- Virtual Private Wealth Seminar (October 14, 2020) | *Speaker* | *Advising UHNW Families During a Period of Seismic Changes*
- The Latest Evolution in Tax-Efficient Investing for Sophisticated Investors, Family Offices, Wealth Advisors, Distributors and Alternative Asset Managers (October 28, 2019)
- Katten Private Wealth Fiduciary Seminar (October 15, 2019) | *Speaker*
- How to Develop or Expand a Family Office, Including Into Direct Investing (May 2, 2019) | *Presenter*
- Estate Planning in Depth 2018 (June 25–28, 2018) | *Presenter* | *Pre- and Post-Liquidity Event Planning for Business Owners* | *ALI CLE Annual Summer Program*
- Aggressive Tax Planning and the Ethical Advisor: Beyond Zealous Advocacy | The Chicago Bar Association (November 13, 2017) | *Presenter*
- NYC Sophisticated Trusts and Estate Institute (November 9, 2017) | *Business Sale Pre and Post-Transaction Planning*
- Notre Dame Tax & Estate Planning Institute (October 27, 2017) | *Aggressive Tax Planning and the Ethical Advisor*
- Pre-Immigration Tax Planning: Fundamental Framework and Important Issues Explored (July 31, 2017)

- American Bar Association—Trust and Estate Business Planning Group (February 17, 2017) | *Best Practices in Reporting Foreign Bank and Financial Accounts*
- Best Practices in Reporting Foreign Bank and Financial Accounts in 2015 (October 21, 2015) | *Co-presenter*
- Winnebago Estate Planning Council (May 15, 2015) | *What Every Estate Planner Should Know About International Estate Planning*
- Chicago Bar Association (June 9, 2014) | *Tax Treatment of Expatriates*
- Chicago Bar Association (March 1, 2011) | *International Trust and Estate Planning*
- Chicago Bar Association (February 10, 2009) | *State Law and Tax Considerations in Trust Decanting*
- Chicago Bar Association (May 3, 2007) | *Basics of Florida Estate and Asset Protection Planning*