

Jeffrey Glickman

Associate

Chicago Office

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Practices

FOCUS: Private Wealth

Business Succession Planning

Charitable Planning, Philanthropy and
Nonprofit Organizations

Fiduciary and Private Client Litigation

Industries

Private Client Services

Education

JD, Northwestern University School of Law,
cum laude

MAS, University of Illinois at Urbana-
Champaign, *with honors*

BS, University of Illinois at Urbana-
Champaign, *with honors*

Bar Admissions

Illinois

Florida

Community Involvements

The Chicago Bar Association

With a practice focused on estates and trusts, Jeffrey Glickman helps clients transfer their wealth during life and at death. To Jeff, estate planning is not a one-size-fits-all project. A CPA and former tax accountant, he combines his legal acumen of estate planning with the tax and other numbers-driven aspects of transferring wealth. Jeff is licensed to practice law in Florida as well as Illinois. He can plan and administer estates in both states and advise clients on establishing Florida residency.

Educating and empowering the client should be part of any good estate plan

Jeff makes it a point to make sure clients understand the mechanics of their estate plan. He takes extra time to be sure that clients actually understand what they are signing. He also helps clients with transferring their ownership interests in their businesses to best leverage their available estate planning techniques. In addition, he helps ensure that business owners have a well-designed succession plan in place for the next generation.

A significant part of Jeff's practice encompasses estate and trust administration for corporate fiduciaries as well as estate planning for individuals and families. He drafts all types of wealth transfer documents including wills, revocable living trusts, dynasty trusts, complicated non-grantor trusts and grantor trusts and various agreements to modify irrevocable trust instruments. He also prepares gift tax returns, estate tax returns and handles all aspects of probate estates in Illinois and Florida.

Previously employed as a tax associate at PwC in Chicago, Jeff has experience drafting corporate and partnership tax returns. This familiarity with the tax code and tax strategies adds immeasurably to the sophistication of his skills in estate planning and administration.

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Publications

- 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)

Presentations and Events

- Katten Private Wealth Fiduciary Seminar (October 15, 2019) | *Speaker*
- Trust Issues Impacting Commercial Bankers (July 15, 2019) | *Speaker*