Caitlin A. Kelly

Associate

Chicago Office

+1.312.902.5419

caitlin.kelly@katten.com

Practices

FOCUS: Private Wealth

Charitable Planning, Philanthropy and Nonprofit Organizations

Fiduciary and Private Client Litigation

International Private Wealth

Education

JD, Loyola University Chicago School of Law

BS, Michigan State University

Bar Admissions

Illinois

Community Involvements

The Chicago Bar Association

Women's Bar Association of Illinois

As an associate in the Private Wealth group, Caitlin Kelly focuses her practice on estate planning, asset protection, trust and estate administration, and wealth preservation. Caitlin performs a wide variety of services for clients, including the preparation of wills, revocable living trusts, dynasty trusts, virtual representation and settlement agreements and other estate planning documents necessary for each individual client and plan.

Any successful endeavor starts with a good plan

From core estate planning documents to more complex and sophisticated gifting and tax planning strategies, Caitlin provides comprehensive and appropriate estate plans, which fit the specific wants and needs of each particular client. Caitlin also has experience representing individuals and fiduciaries alike in contested estate and trust matters. She takes her role as a counselor very seriously and enjoys assisting clients during what can be the emotional and complicated process of getting their affairs in order.

With her prior experience at a boutique estate planning firm, Caitlin has a keen eye for detail and ample experience assisting families and business owners in planning their estates, protecting assets, transferring wealth and minimizing taxation.

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)
- 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) | *Panelist* | *Corporate Transparency Act: Overview and Update*
- 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*
- Understanding the Corporate Transparency Act | Chicago Bar Association Young Lawyers Section Estate Planning Committee (April 3, 2023) | *Presenter*
- Updates on Proposed SECURE Act Regulations | The Chicago Bar Association Trust Law Committee | Co-Presenter (November 14, 2022)