

# Michael O. Hartz

## Partner

Chicago Office

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### Practices

FOCUS: Private Wealth

Business Succession Planning

Charitable Planning, Philanthropy and  
Nonprofit Organizations

Corporate

### Industries

Private Client Services

### Education

LLM, University of Florida

JD, University of Detroit Mercy School of Law

BA, Kalamazoo College

### Bar Admissions

Illinois

### Community Involvements

*Trusts & Estates*, Estate Planning & Taxation  
Committee

Described by clients as a "phenomenal practitioner and extremely bright," Michael Hartz advises on business succession planning, tax-efficient wealth transfer into trusts for future generations and strategies for fulfilling philanthropic goals. Michael is ranked among the leading lawyers for private wealth law in *Chambers High Net Worth*, where his practical, effective solutions to complex problems have led to consistent recognition. With 40 years of experience in trust and estate planning and administration, Michael has exceptional insight into the issues that confront families, family-owned businesses and wealthy entrepreneurs.

### A recognized leader in trust and estate planning

Michael's experience, attention to detail and care for his clients guide his handling of every matter. Primarily representing high net worth family business owners, including owners of some of the largest businesses in the Midwest, Michael helps them from the early stages of wealth creation through wealth transfer planning and charitable giving issues. He advises on all phases of estate planning, trust administration, ownership transition and risk management.

Michael also designs and administers family business succession plans. Many of his clients require sophisticated planning techniques to shift future wealth to the next generations in a fair and tax-efficient way. He helps his clients with integrating charitable planning strategies into their overall estate plans. Michael understands that many facets of his clients' lives will impact the design of their estate plans. Evaluating the various complexities, he assists clients to achieve their trust and estate planning goals.

A prolific author, Michael has written articles on tax and estate planning matters for publications such as the *Journal of Taxation* and *TAXES*, and he serves on the Estate Planning & Taxation Committee for *Trusts & Estates* magazine. Michael has been recognized by both *Chambers High Net Worth* and *Best Lawyers in America*, and he is a Fellow of the American College of

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**"Another source comments that 'aside from being a phenomenal practitioner and extremely bright, he is just a good person. He's compassionate and when he talks with clients, he understands and he communicates well.'"**

*- Chambers HNW 2018 (Illinois, Private Wealth Law) survey response*

Trust and Estate Counsel. He speaks frequently at estate planning and tax seminars.

## Recognitions

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*Recognized or listed in the following:*

- American College of Trust and Estate Counsel
  - Fellow
- *Best Lawyers in America*
  - Illinois, 2019
  - Trusts and Estates, 2008–2022
  - Lawyer of the Year
    - Trusts and Estates, Chicago, 2017, 2021
- *Chambers High Net Worth*
  - Illinois: Private Wealth Law, 2016–2021
- *Chambers USA*
  - Leading Individual, 2017
- *Citywealth*
  - Top 100 Private Client Lawyers, 2021
  - Leaderslist, 2015–2016
- Leading Lawyers Network
  - 2003–2021
- Super Lawyers
  - Illinois, 2005–2021

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## News

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- Katten's Private Wealth Leaders Named Among *Citywealth's* 'Top 100 Private Client Lawyers' (September 17, 2021)
- Katten Attorneys Listed in *The Best Lawyers in America*® (August 19, 2021)
- Katten Attorneys Selected for *Chambers High Net Worth 2021* Guide (July 22, 2021)
- Katten Attorneys Chosen for 2021 Illinois Super Lawyers, Rising Stars Lists (January 29, 2021)
- Katten Attorneys Distinguished as Top Legal Talent in the 2021 *Best Lawyers in America* and *Best Lawyers: Ones to Watch* Lists (August 20, 2020)
- A Dozen Katten Partners Recognized in *Chambers High Net Worth* Guide (July 9, 2020)
- Katten Attorneys Selected to 2020 Illinois Super Lawyers, Rising Stars Lists (January 29, 2020)
- *Chambers High Net Worth* Guide Recognizes Katten's Private Wealth Practice (July 12, 2019)
- Super Lawyers Lists Honor More Than 50 Katten Attorneys in Illinois (January 24, 2019)
- Katten's "Top-Notch" Private Wealth Practice Praised in *Chambers High Net Worth* Guide (August 6, 2018)
- Katten Attorneys Recognized in 2018 Illinois Super Lawyers, Rising Stars Lists (January 25, 2018)
- Katten Private Wealth Practice Hailed in *Chambers High Net Worth* Guide for Top Talent and Cross-Border Excellence (September 15, 2017)

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- Katten Attorneys Recognized in 2017 Illinois *Super Lawyers*, Rising Stars Lists (January 13, 2017)
- 79 Katten Attorneys Selected for *Best Lawyers in America*® 2017 (August 15, 2016)
- Katten Private Wealth Practice Lauded in Inaugural *Chambers High Net Worth* 2016 Guide (June 24, 2016)
- Forty-Seven Katten Attorneys Recognized in 2016 Illinois *Super Lawyers* List (January 8, 2016)
- 91 Katten Attorneys Recognized in *Best Lawyers in America*® 2016 (August 17, 2015)
- Fifty-Three Katten Attorneys Recognized in 2015 Illinois *Super Lawyers* List (January 12, 2015)
- 85 Katten Attorneys Named to *Best Lawyers in America*® 2015 (August 18, 2014)
- Fifty-Four Katten Attorneys Recognized in 2014 Illinois *Super Lawyers* List (January 13, 2014)
- 83 Katten Attorneys Lauded in *Best Lawyers in America*® 2014 (August 15, 2013)
- Sixty-Nine Katten Attorneys Included on 2013 Illinois *Super Lawyers* List (January 4, 2013)
- 80 Katten Attorneys Named to *Best Lawyers in America*® 2013 Guide (August 24, 2012)
- Eighty-Six Katten Attorneys Named 2012 Illinois Super Lawyers (February 28, 2012)
- 75 Katten Attorneys Named to *Best Lawyers in America*® 2012 Guide (September 12, 2011)
- Partners Joshua Rubenstein, Michael Hartz Named to *Citywealth* Leaders List (January 2011)
- 70 Katten Attorneys Named to *Best Lawyers in America*® 2011 (August 9, 2010)

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- 66 Katten Attorneys Named to 2010 List of *Best Lawyers in America*® (August 5, 2009)
- 50 Katten Attorneys Named to 2009 List of *Best Lawyers in America*® (September 23, 2008)
- 46 Katten Attorneys Named to 2008 List of *Best Lawyers in America*® (October 31, 2007)
- *Citywealth* Names Three Katten Partners to List of Top 100 Wealth Advisors in North America (May 19, 2006)

## Publications

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- 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)
- 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)

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- 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)
- IRS Releases Guidance on Foreign Financial Asset Reporting (February 1, 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)
- 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)
- Opportunities: Cloud Over Economy Creates Estate Planning Silver Lining (February 2008)

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