Benjamin Lavin

Partner

Private Wealth

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Benjamin Lavin represents high-net-worth individuals, including equity fund principals and business owners, in wealth transfer and estate planning matters on income, gift, estate and GST tax optimization and asset protection. He also is experienced in designing and implementing sophisticated and personalized estate plans. He knows that only by fully understanding a client's personal and business problems, can an attorney craft the right strategy to resolve them.

Estate planning that reflects a client's personal and business concerns

Benji designs estate plans which allow high-net-worth individuals to leverage use of their gift, estate and generation-skipping transfer tax (GST) exemptions and to pass wealth to the next generation in a manner which is both tax efficient and creditor protected. His practice often involves the implementation of sales to grantor trusts, grantor retained annuity trusts (GRATs), charitable lead and remainder trusts, and business entities designed to achieve numerous non-tax and tax objectives.

Benji advises principals in private equity, venture capital and hedge funds regarding strategies for transferring their fund interests to minimize the impact of income, estate, gift and GST taxes. He advises business owners concerning business succession planning and has substantial experience with an array of asset protection techniques, including offshore and domestic asset protection trusts. Benji also represents fiduciaries in the administration of estates and trusts, the formation and operation of private foundations and sophisticated charitable giving techniques.

Recognitions

Recognized or listed in the following:

- *Best Lawyers in America*
  - Ones to Watch
    - Trusts and Estates, 2021–2025

Practices

- Business Succession Planning
- Charitable Planning, Philanthropy and Nonprofit Organizations
- Private Wealth

Bar Admissions

- Illinois
- Arizona

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News

- Katten Announces 2024 Partner Promotions (August 27, 2024)
- Katten Attorneys Recognized as *Best Lawyers®* and *Best Lawyers: Ones to Watch®* Award Recipients (August 15, 2024)
- Katten Attorneys Distinguished by *Best Lawyers®* (August 17, 2023)
- Katten Attorneys Recognized by *Best Lawyers®* (August 18, 2022)
- Katten Attorneys Listed in *The Best Lawyers in America®* (August 19, 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)

Publications

- 2024 Year-End Estate Planning Advisory (November 26, 2024)
- 2023 Year-End Estate Planning Advisory (November 20, 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)
- 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

- Trust Law: Where Did Time Go–Sunsetting of TCJA Exemption Levels and Post 2025 Estate Planning Considerations (June 18, 2025) | *Speaker*
- SECURE Act Update (Trust Planning) | The Chicago Bar Association Trust Law Committee (November 18, 2024) | *Speaker*
- 2024 Private Wealth and Fiduciary Seminar Chicago (October 30, 2024) | *Speaker*

- Trust Law: Planning for 2026 | Presented by The Chicago Bar Association (May 29, 2024) | *Speaker*
- Powers of Appointment: Your "Power" Tool for Drafting and Implementing Illinois Trusts | Presented by Illinois State Bar Association Trust & Estates Section (November 9, 2023) | *Speaker*
- Annual Katten Private Wealth & Fiduciary Seminar (October 11, 2023)
- Updates on Proposed SECURE Act Regulations | The Chicago Bar Association Trust Law Committee | Co-Presenter (November 14, 2022)
- Annual Katten Private Wealth and Fiduciary Seminar (September 22, 2022)
- Entrepreneur Client: SPACs and QSBS (February 14, 2022) | *Presenter* | *Entrepreneur Client: SPACs and QSBS*
- Katten Virtual Private Wealth Seminar (October 14, 2020) | *Speaker* | *Advising UHNW Families During a Period of Seismic Changes*
- What Rising Private Equity Professionals Need to Know About Estate Planning and Investment Planning (May 8, 2020) | *Panelist*
- Katten Private Wealth Fiduciary Seminar (October 15, 2019) | *Speaker*