Caitlin A. Kelly

Associate

Private Wealth

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Caitlin Kelly focuses her practice within the trust and estate administration space, focusing on high-net-worth and ultra-high-net-worth individuals and families. She advises clients on a variety of matters surrounding the administration process, including assisting individual fiduciaries in administering trusts and estates and working with clients to ensure their goals are achieved, during and after their lives. She works closely with clients on their planning, ranging from "core" estate planning documents to more complex trusts, gifting and succession strategies.

Any successful endeavor starts with a good plan

Caitlin provides people with the support and tools to protect their assets, preserve wealth, minimize taxes and ensure stability for their loved ones while preparing for the future. The goal is to make a client feel at ease knowing that their wishes are being carried out while becoming better prepared for what life throws their way. This includes creating wealth transfer strategies and estate planning documents that are tailored to each individual client and family — including preparing and implementing revocable and irrevocable trusts, wills, powers of attorney for property and healthcare, life insurance trusts, gifting trusts, as well as formation and succession planning documents for family-owned businesses. She also helps clients and their families orchestrate the plans of their loved ones, including working with the family advisors to administer the planning that was put in place during the clients' lives.

Caitlin is a member of the Real Property, Trust and Estate Law Section of the American Bar Association, the Trusts and Estates section of the Illinois Bar Association, the Chicago Bar Association Trust Law Practice Committee, as well as a member of the Chicago Estate Planning Council.

Publications

- IRS Issues Transfer Tax Safe Harbor for Contributions to Trump Accounts (July 20, 2026)
- 2025 – 2026 Planning Priorities (November 19, 2025)

Practices

- Business Succession Planning
- Fiduciary and Private Client Litigation
- Private Wealth

Industries

- Family Offices
- Private Client Services

Education

- JD, Loyola University Chicago School of Law
- BS, Michigan State University

Bar Admissions

- Illinois

- The One Big Beautiful Bill Act: Key Year-End Tax Changes for Private Wealth Clients (November 19, 2025)
- Relevant International Updates (November 19, 2025)
- Select Federal Caselaw Updates (November 19, 2025)
- Planning Considerations for the Rest of 2025 and Into 2026 (November 19, 2025)
- State of the States (November 19, 2025)
- Select Updates Impacting Family Business Owners (November 19, 2025)
- 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

- 2026 Private Wealth and Fiduciary Seminar Chicago (October 28, 2026) | *Speaker* | *The Plan Isn't Finished: Post-Death Planning Opportunities in Estate and Trust Administration*
- The Ins and Outs of Grantor Trust Rules | Chicago Estate Planning Council (May 12, 2026) | *Co-Presenter*
- DePaul University College of Law | Wills & Trusts Course (April 23, 2026) | *Guest Lecturer*
- Choosing An Asset Protection State | The Chicago Bar Association Trust Law Committee (February 9, 2026) | *Speaker*
- 2025 Private Wealth Seminar – Chicago (October 30, 2025) | *Presenter* | *Probate Potpourri*
- Charting a Course for Family Business Legal Leadership: GCs and Principals in Dialogue (April 16, 2024)
- Annual Katten Private Wealth & Fiduciary Seminar (October 11, 2023)

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- 46th Annual National Trust Closely Held Business Association (NTCHBA) Conference | Presented by Northern Trust (September 19, 2023) | *Presenter* | *Understanding the Corporate Transparency Act*