Kelli Chase Plotz

Counsel

Private Wealth

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With more than 20 years' experience in trusts and estates law, Kelli Plotz helps clients develop plans to ensure the preservation of their wealth and the execution of their wishes. She administers multimillion-dollar estates and interfaces with accountants on a variety of estate and gift tax issues. She also has extensive experience in litigation and the defense and representation of fiduciaries embroiled in family disputes and contested issues.

A detail-oriented approach to trusts and estates law

Kelli's practice includes the drafting and implementation of wills, revocable trusts, powers of attorney for health care, powers of attorney for property, irrevocable life insurance trusts, children's trusts and spendthrift trusts, qualified personal residence trusts, intentionally defective grantor trusts and corresponding sale agreements/grantor retained annuity trusts, family limited partnerships, limited liability companies, premarital agreements and prenuptial agreements, and gifting and charitable lead annuity trusts. Kelli also works with family-owned businesses to formulate succession plans and advise on wealth preservation.

Publications

- 2025 – 2026 Planning Priorities (November 19, 2025)
- The One Big Beautiful Bill Act: Key Year-End Tax Changes for Private Wealth Clients (November 19, 2025)
- Planning Considerations for the Rest of 2025 and Into 2026 (November 19, 2025)
- Select Updates Impacting Family Business Owners (November 19, 2025)
- Select Federal Caselaw Updates (November 19, 2025)
- Relevant International Updates (November 19, 2025)
- State of the States (November 19, 2025)
- 2024 Year-End Estate Planning Advisory (November 26, 2024)

Practices

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

Industries

- Private Client Services

Education

- JD, DePaul University College of Law
- BS, University of Illinois

Bar Admissions

- Illinois

Community Involvements

- The Chicago Bar Association
- Illinois State Bar Association

- 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)
- 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)
- 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)
- 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)
- Possible One-Year Elimination of Estate and Generation-Skipping Transfer Tax in 2010: Going, Going, Gone? (December 23, 2009)
- 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)

Presentations and Events

- 2025 Private Wealth Seminar – Chicago (October 30, 2025) | *Presenter* | *Probate Potpourri*
- Katten Virtual Private Wealth Seminar (October 14, 2020) | *Speaker* | *Advising UHNW Families During a Period of Seismic Changes*