Jeffrey D. Glickman

Partner

Private Wealth

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With a practice dedicated to estate planning and trust administration, Jeffrey D. Glickman helps clients at all levels of wealth with their myriad and unique legal issues — both for matters during their lifetime and legacy planning beyond. A CPA and former tax accountant, Jeff combines his nuanced legal acumen of estate planning with the complex tax considerations of transferring wealth. Jeff's clients appreciate his attention to detail and his robust analytical skills. Jeff believes that estate planning is too important and can be too costly to correct. So, Jeff puts extensive effort into ensuring clients achieve their goals, no matter what unknowns may eventually surface. With extensive and comprehensive experience working with corporate trustees, Jeff is a sought-after counselor for trust modifications, providing the best service possible — and creative solutions — for all types of clients. He is licensed to practice law in Florida and Illinois and is a trusted resource in advising clients on establishing Florida residency.

Educating and empowering clients should be part of any good estate plan or administrative matter

Jeff makes it a point to ensure his clients truly understand the mechanics of their estate plans so clients can see for themselves that their wishes have been properly addressed. He firmly believes estate planning is too important to simply rely on an attorney's say so. Estate planning (and the tax strategies that go with it) are often not intuitive. Jeff breaks down the various estate planning components, using terms and illustrations that make the abstract much more understandable. He also helps clients with transferring their ownership interests in their businesses to best leverage their available estate planning techniques. In addition, he helps ensure that business owners have a well-designed succession plan in place for the next generation so that uncertainty regarding the direction of the business can be mitigated to the greatest extent possible.

A large portion of Jeff's practice focuses on assisting corporate trustees in their administration of trusts. Many trusts can quickly become outdated or

Practices

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

Industries

- Private Client Services

Education

- JD, Northwestern University School of Law, *cum laude*
- MAS, University of Illinois at Urbana-Champaign, *with honors*
- BS, University of Illinois at Urbana-Champaign, *with honors*

Bar Admissions

- Illinois
- Florida

Community Involvements

- Chicago Estate Planning Council
- The Chicago Bar Association

no longer perform in the way the trust was initially intended. Jeff and his team identify tailored and creative solutions to enhance the administration of the trust (either by a trust modification or a change in approach to the administration of the trust) that help strengthen the trustee-beneficiary relationship for all involved. Jeff drafts all types of wealth transfer documents, including wills, revocable living trusts, dynasty trusts, charitable trusts, insurance trusts, grantor retained annuity trusts, QTIP marital trusts, and other complicated non-grantor trusts and grantor trusts, as well as various agreements to modify irrevocable trust instruments (including nonjudicial settlement agreements and trust decantings). He also prepares gift tax returns, estate tax returns and handles all aspects of probate estates in Illinois and Florida.

Previously employed as a tax associate at PwC in Chicago, Jeff has experience drafting corporate and partnership tax returns. This familiarity with the tax code and tax strategies adds immeasurably to his ability to effectively counsel clients in estate planning and administration.

Recognitions

Recognized or listed in the following:

- *Best Lawyers in America*
  - Ones to Watch
    - Trusts and Estates, 2021–2025
- *Super Lawyers Rising Stars*
  - Illinois, 2023–2024

News

- Katten Attorneys Recognized as *Best Lawyers®* and *Best Lawyers: Ones to Watch®* Award Recipients (August 15, 2024)
- Katten Attorneys Named to 2024 Illinois Super Lawyers, Rising Stars Lists (January 25, 2024)
- Katten Attorneys Distinguished by *Best Lawyers®* (August 17, 2023)
- Katten Promotes 10 Attorneys to Partner (August 15, 2023)
- Katten Attorneys Selected to 2023 Illinois Super Lawyers, Rising Stars Lists (January 24, 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

- 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

- Powers of Appointment: Your "Power" Tool for Drafting and Implementing Illinois Trusts | Presented by Illinois State Bar Association Trust & Estates Section (November 9, 2023) | *Moderator*
- Annual Katten Private Wealth & Fiduciary Seminar (October 11, 2023)
- Estate Planning Hot Topics for 2023 (April 21, 2023)
- 2023andMe: Key Tips for Wealth Planners for the Year Ahead (February 22, 2023)
- Annual Katten Private Wealth and Fiduciary Seminar (September 22, 2022)
- Help(!) in Navigating the Long and Winding Roads: Estate Planning with Cryptocurrency and Florida SLATs (August 24, 2022)
- Recent (and Very Recent) Developments in Illinois Trust Law and Estate Planning (November 18, 2021) | *Presenter*
- A Look Into Estate Planning in Illinois Versus Out-of-State Trust Jurisdictions (November 10, 2020) | *Speaker*
- Katten Virtual Private Wealth Seminar (October 14, 2020) | *Speaker* | *Advising UHNW Families During a Period of Seismic Changes*

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- Katten Private Wealth Fiduciary Seminar (October 15, 2019) | *Speaker* | *Aggressive Tax Planning and the Ethical Advisor*
- Trust Issues Impacting Commercial Bankers (July 15, 2019) | *Speaker*
- Heckerling 2019 Roundup (March 18, 2019) | *Speaker*
- Income Tax Planning Given the Increased Exemption (January 14, 2019) | *Speaker*