David M. Allen

Partner

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Practices

FOCUS: Private Wealth
Business Succession Planning
Charitable Planning, Philanthropy and Nonprofit Organizations
Fiduciary and Private Client Litigation
International Private Wealth

Industries

Family Offices
Private Client Services

Education

JD, University of Michigan Law School
BA, University of Virginia

Bar Admissions

Illinois
Michigan

Community Involvements

The Chicago Bar Association
Society of Trust and Estate Practitioners (STEP)

David Allen helps high-net-worth individuals and families with all their legal needs. With an approach that seamlessly integrates estate planning, tax minimization and concierge lawyering, David's advice allows his clients to spend less time managing advisors and more time focusing on their passions, their businesses and their families.

Preserving legacies with a holistic approach

From restructuring valuable art collections to coordinating legal services for multibillion-dollar family businesses and family offices, David is often the first and only phone call his clients need to make. His clients live around the world and include private business owners, corporate executives, hedge fund managers and private equity principals.

Former professor at John Marshall Law School, David taught a course on estate and gift tax law, and he is a frequent speaker on estate and tax planning related topics, including pre-business sale tax and estate planning, international trust and estate planning, income taxation of trusts, ethical tax planning, trust decanting and estate planning with digital assets. David is also vice chair of the Society of Trust and Estate Practitioners (STEP) Chicago Branch.

Recognitions

Recognized or listed in the following:

- *Best Lawyers in America*
  - Trusts and Estates, 2018–2024
- *Leading Lawyers Network*
  - Emerging Lawyer, 2015

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News

- 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)
- David Allen Discusses Sophisticated Estate Planning Strategies in Verit Advisors Article (September 2015)
- Partner David Allen Interviewed by *Forbes* on Estate Planning for Middle-Market Business Owners (March 16, 2015)
- Katten Names Sixteen New Partners in Five Practice Areas (August 5, 2014)
- Katten Honors Eight Attorneys With Pro Bono Service Awards (July 20, 2012)

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)

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- 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)
- Sweating The Small Stuff: Pre- and Post-Liquidity Event Planning For Business Owners (August 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

- Annual Katten Private Wealth & Fiduciary Seminar (October 11, 2023)
- Annual Katten Private Wealth and Fiduciary Seminar (September 22, 2022)
- 64th Annual Estate Planning Short Course (May 25, 2021) | *Panelist* | *Intersection of Alternative Investments & Estate Planning: Taxation, Planning and Fiduciary Risk Issues*
- Katten Virtual Private Wealth Seminar (October 14, 2020) | *Speaker* | *Advising UHNW Families During a Period of Seismic Changes*
- The Latest Evolution in Tax-Efficient Investing for Sophisticated Investors, Family Offices, Wealth Advisors, Distributors and Alternative Asset Managers (October 28, 2019)

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- Katten Private Wealth Fiduciary Seminar (October 15, 2019) | *Speaker*
- How to Develop or Expand a Family Office, Including Into Direct Investing (May 2, 2019) | *Presenter*
- Estate Planning in Depth 2018 (June 25–28, 2018) | *Presenter* | *Pre- and Post-Liquidity Event Planning for Business Owners* | *ALI CLE Annual Summer Program*
- Aggressive Tax Planning and the Ethical Advisor: Beyond Zealous Advocacy | The Chicago Bar Association (November 13, 2017) | *Presenter*
- NYC Sophisticated Trusts and Estate Institute (November 9, 2017) | *Business Sale Pre and Post-Transaction Planning*
- Notre Dame Tax & Estate Planning Institute (October 27, 2017) | *Aggressive Tax Planning and the Ethical Advisor*
- Pre-Immigration Tax Planning: Fundamental Framework and Important Issues Explored (July 31, 2017)
- American Bar Association—Trust and Estate Business Planning Group (February 17, 2017) | *Best Practices in Reporting Foreign Bank and Financial Accounts*
- Best Practices in Reporting Foreign Bank and Financial Accounts in 2015 (October 21, 2015) | *Co-presenter*
- Winnebago Estate Planning Council (May 15, 2015) | *What Every Estate Planner Should Know About International Estate Planning*
- Chicago Bar Association (June 9, 2014) | *Tax Treatment of Expatriates*
- Chicago Bar Association (March 1, 2011) | *International Trust and Estate Planning*
- Chicago Bar Association (February 10, 2009) | *State Law and Tax Considerations in Trust Decanting*
- Chicago Bar Association (May 3, 2007) | *Basics of Florida Estate and Asset Protection Planning*