



## Tracy E. Lyerly

Special Counsel

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*Chicago*

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### Practices

FOCUS: Trusts and Estates

### Industries

Private Client Services

### Education

JD, The University of Chicago Law School

MA, The University of Chicago

BA, University of Pennsylvania

### Bar Admissions

Illinois

Tracy E. Lyerly concentrates her practice on tax and estate planning matters for high-net-worth individuals—including closely held business owners, corporate executives and other professionals—and their families and family offices.

Tracy's practice primarily involves structuring and implementing complex estate plans to transfer wealth to subsequent generations, taking into account tax efficiency (for purposes of estate, gift and generation-skipping transfer taxes), creditor protection, and each family's specific needs and non-tax estate planning goals. Accordingly, Tracy's practice includes drafting revocable and irrevocable trust agreements, forming corporations, partnerships, limited liability companies and charitable entities, and preparing powers of attorney.

Tracy also drafts and negotiates premarital agreements, counsels fiduciaries—including corporate fiduciaries—administering trusts and decedents' estates, prepares nonjudicial settlement agreements, and represents fiduciaries and others in probate matters.

### Memberships

- The Chicago Bar Association

### Advisories

- 2018 Year-End Estate Planning Advisory (November 19, 2018)

### Articles

- Katten Team Publishes 2018 Year-End Estate Planning Series (December 4–7, 2018)

### Speaking Engagements & Presentations

- Speaker | Heckerling 2019 Roundup | Trusts and Estates Practice Group of BMO Financial Group (March 18, 2019)