Kelli Chase Plotz

Special Counsel

kelli.plotz@kattenlaw.com

Chicago

p +1.312.902.5347

Practices

FOCUS: Trusts and Estates

Fiduciary Litigation

Industries

Private Client Services

Education

JD, DePaul University College of Law

BS, University of Illinois

Bar Admissions

Illinois

Kelli Plotz concentrates her practice in corporate matters and wealth management, including more than 20 years of experience in trust and estate law. She has successfully administered multi-million dollar estates and often interfaces with accountants on a variety of estate and gift tax issues. Kelli has extensive experience in Trust and Estates litigation and the defense and representation of fiduciaries embroiled in family disputes and contested issues.

Kelli's practice experience includes the drafting and implementation of wills, revocable trusts, powers of attorney for health care, powers of attorney for property (POAs), irrevocable life insurance trusts (ILITs), children's trusts and spendthrift trusts, qualified personal residence trusts (QPRTs), intentionally defective grantor trusts and corresponding sale agreements/grantor retained annuity trusts (GRATs), family limited partnerships (FLPs), limited liability companies (LLCs), premarital agreements and prenuptial agreements, and gifting and charitable lead annuity trusts (CLATs).

Additionally, Kelli works with family-owned businesses to formulate succession plans and advise on wealth preservation.

Memberships

- The Chicago Bar Association
- Illinois State Bar Association

Advisories

- 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)