ArentFox Schiff LLP
Attorneys

Sarah Kerr Severson

Partner

Sarah Kerr Severson takes a holistic approach to helping individuals and multigenerational families implement and manage comprehensive estate plans and business succession plans.

- Industries
  Family Office Services
  Family Office University
  Private Companies
  Distressed Family Debt
- Practices
  Private Clients, Trusts & Estates
  Business Succession Planning
  Estate Planning
  Trust & Estate Disputes
  Wealth Transfer Strategies
- Education
  Northwestern University Pritzker School of Law, JD, Journal of Criminal Law and Criminology, Member, 1998
  The University of Iowa, BA, summa cum laude; Phi Beta Kappa, Alpha of Iowa chapter, President, 1995

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Sarah brings an instinct for facilitating transition and a keen awareness of the "softer side," familial and social issues, which uniquely position her to guide clients through special needs planning, wealth transfer planning and charitable planning techniques.

A counselor to those with significant wealth, Sarah assesses her client's circumstances, diagnoses the issues and coordinates a plan that meets both immediate and long-term goals. Her holistic approach takes into account all of the financial, personal, tax and non-tax objectives in play.

Sarah recognizes that her client's plans and established entities have lives of their own; they need continuous care and feeding. Sarah quarterbacks all issues that affect her clients and takes very seriously her role as a trusted business adviser and confidant for current and future generations.

Client Work

- Guiding individuals and multigenerational families through estate, trust and guardianship litigation and administration.
- Serving as special counsel to individuals and multigenerational families when conflicts arise.
- Assisting multigenerational families with developing and adopting a business succession plan, including educating the next generation.
- Educating clients about charitable planning techniques, establishing the charitable entity and advising on all administrative processes.
- Creating the blueprint and facilitating implementation of comprehensive, client-specific, leveraged wealth transfer techniques.

- Counseling clients through the unique planning and solutions available to individuals with special needs and disabilities, ranging from special needs trusts to guardianships.
- Advising individual and corporate fiduciaries on all aspects of administration and liability, ranging from fiduciary best practices and risk management to representation in litigation.

Publications, Presentations & Recognitions

Presentations

Sarah frequently lectures on a wide range of estate planning topics. Her audiences include professional advisory groups, employer-sponsored seminars, corporate clients and the Illinois Institute of Continuing Legal Education (IICLE). Topics on which Sarah has spoken include:

- "AI in Estate Planning: Ethical and Practical Considerations"
- "Incapacity: How to Talk About It, Identify It, and Prepare For It"
- "The Engaged Beneficiary: What You Need to Know"
- "Diagnostic Tools for Estate and Business Succession Planning"
- "Becoming Financially Savvy"
- "Planning with Life Insurance: Opportunities and Obstacles"
- "Personal Wealth Action Plans for Private Equity Professionals"
- "How to Inform, Inspire and Integrate the Next Generation"
- "Time-Sensitive Estate and Gift Planning Opportunities"
- "Managing Fiduciary Risk"
- "Successful Women Invest in Themselves"
- "Am I Too Young For Estate Planning?"
- "Preparer Guide to the Federal Estate Tax Return"
- "Planning With Disclaimers"
- "Planning For Disabled Beneficiaries"
- "A Roadmap Through the Estate Planning Process"
- "Business Succession Planning Tips"
- "Special Issues in Illinois Guardianships"

Publications

- Litigation in Illinois Guardianships," in *Estate, Trust, and Guardianship Litigation, 2002 Edition* (2006 Update), Illinois Institute of Continuing Legal Education

Recognitions

- *Chambers High Net Worth* – Private Wealth Law, Illinois (2018-2024)
- The Best Lawyers in America, *Best Lawyers* (2021-2024)
- Illinois Leading Lawyer, Law Bulletin's *Illinois Leading Lawyers Network* (2011-2021)
- Top 100 Women Consumer Lawyers, Law Bulletin's *Illinois Leading Lawyer's Network* (2013)
- Rising Star, Anti-Defamation League (2010)

Boards, Memberships & Certifications

Boards

- Mark Morton Memorial Fund, President

Memberships

- Chicago Bar Association
- Family Wealth Alliance
- Illinois State Bar Association
- La Grange Lawyers League

Bar Admissions
Illinois