



# 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

[Private Companies](#)

## Practices

[Corporate & Securities](#)

[Private Clients, Trusts & Estates](#)

## Education

Northwestern 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

## Offices

[Chicago](#)

## Phone

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## Email

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Sarah brings an instinct for facilitating transition and a keen awareness of the “softer side” of 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 quarterbackes 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

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### 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 (2018-2023)
- 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

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### Boards

- Mark Morton Memorial Fund, President

### Memberships

- Chicago Bar Association
- Family Wealth Alliance
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Illinois State Bar Association

— La Grange Lawyers League

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## **Bar Admissions**

[Illinois](#)