



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](#)
[Private Companies](#)

Practices

[Private Clients, Trusts & Estates](#)

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

Offices

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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
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Illinois State Bar Association

— La Grange Lawyers League

Bar Admissions

[Illinois](#)