Tracy E. Lyerly

Counsel

Chicago Office

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Practices

FOCUS: Private Wealth

Business Succession Planning

Charitable Planning, Philanthropy and Nonprofit Organizations

Industries

Private Client Services

Education

JD, The University of Chicago Law School

MA, The University of Chicago

BA, University of Pennsylvania

Bar Admissions

Illinois

Community Involvements

The Chicago Bar Association

Tracy Lyerly assists high-net-worth individuals, including closely held business owners, corporate executives and other professionals, in transferring wealth per their personalized estate planning needs and tax planning objectives. She also advises individual and corporate fiduciaries administering trusts and decedents' estates and represents fiduciaries and others in probate matters.

Peace of mind at the crossroads of tax law and family dynamics

Tracy structures and implements complex estate plans that balance family, business and charitable interests and that also incorporate appropriate strategies for tax efficiency and creditor protection.

Publications

- 2023 Year-End Estate Planning Advisory (November 20, 2023)
- 2022 Year-End Estate Planning Advisory (November 17, 2022)
- 2021 Year-End Estate Planning Advisory (November 22, 2021)
- Proposed Tax Legislation Would Dramatically Impact Private Wealth Planning (September 24, 2021)
- 2021 Biden Plan Estate Planning Advisory (January 15, 2021)
- 2020 Year-End Estate Planning Advisory (November 24, 2020)
- 2019 Year-End Private Wealth Advisory (November 25, 2019)
- Katten Team Publishes 2018 Year-End Estate Planning Series (December 4–7, 2018)
- 2018 Year-End Estate Planning Advisory (November 19, 2018)

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Presentations and Events

- Generation Skipping Transfer (GST) Presentation to BMO Financial Group (May 20, 2021) | *Presenter*
- Katten Virtual Private Wealth Seminar (October 14, 2020) | *Speaker* | *Advising UHNW Families During a Period of Seismic Changes*
- Maintaining Flexibility in Estate Planning (June 8, 2020) | *Presenter*
- Trusts and Estates Practice Group of BMO Financial Group (March 18, 2019) | *Speaker* | *Heckerling 2019 Roundup*