



Sarah Kerr Severson

Partner
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Overview

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

Practices

- Business Succession Planning
- Estate Planning
- Family Office Services
- Private Clients, Trusts and Estates
- Private Companies
- Trust and Estate Litigation
- Wealth Transfer Strategies

Experience

- 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.

Credentials

Education

- Northwestern Pritzker School of Law, J.D., 1998
Journal of Criminal Law and Criminology, Member
- University of Iowa, B.A., 1995, *summa cum laude*
Phi Beta Kappa, Alpha of Iowa chapter, President

Bar Admissions

- Illinois

Professional Memberships

- Chicago Bar Association
- Family Office Exchange, Thought Leaders Council
- Illinois State Bar Association
- LaGrange Lawyers League

Insights

07.09.2020

News Release

Schiff Trusts and Estates Group and Attorneys Recognized in 2020 *Chambers High Net Worth*

02.19.2020

News Release

Eighty-Eight Attorneys Named to 2020 Leading Lawyers

10.28.2019

Event

The Engaged Beneficiary: What You Need to Know

07.12.2019

News Release

Schiff Trusts and Estates Group and Attorneys Recognized in 2019 *Chambers High Net Worth*

02.04.2019

News Release

2019 Leading Lawyers Lists Recognize 95 Schiff Attorneys

07.20.2018

News Release

Schiff Hardin Attorneys Recognized as “Leaders in Their Field” in 2018 Chambers High Net Worth

02.01.2018

News Release

95 Schiff Hardin Lawyers Named to 2018 Leading Lawyers Lists

04.01.2017

News Release

99 Schiff Hardin Attorneys Named to 2017 Leading Lawyers List

03.05.2016

News Release

91 Schiff Hardin Lawyers Named to 2016 Illinois, Michigan *Leading Lawyers Network*

03.06.2015

News Release

114 Schiff Hardin Lawyers Named to 2015 Illinois, Michigan *Leading Lawyers Network*

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Other Publications

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

Speeches & 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:

- "The Engaged Beneficiary: What You Need to Know", FOX Rising Gen Forum, Chicago, Ill. (Oct. 28, 2019)
- "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"

Citizenship

Civic and Charitable Memberships

- Mark Morton Memorial Fund, President
- Strategic Philanthropy, Ltd., Advisory Board

AWARDS & HONORS

- Best Lawyers in America (2021)
U.S. News & World Report
- Chambers High Net Worth (2020)
"Leaders in Their Field"
- Illinois Leading Lawyer (2020)
Law Bulletin's Illinois Leading Lawyers Network
- Chambers High Net Worth (2019)
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- Illinois Leading Lawyer (2017)
Law Bulletin's Illinois Leading Lawyers Network
- Illinois Leading Lawyer (2016)

Law Bulletin's *Illinois Leading Lawyers Network*

- **Illinois Leading Lawyer (2015)**
Law Bulletin's *Illinois Leading Lawyers Network*
- **Illinois Leading Lawyer**
Law Bulletin's *Illinois Leading Lawyers Network* (2014)
- **Top 100 Women Consumer Lawyers**
Law Bulletin's *Illinois Leading Lawyers Network* (2013)
- **Illinois Leading Lawyer**
Law Bulletin's *Illinois Leading Lawyers Network* (2013)
- **Illinois Leading Lawyer**
Law Bulletin's *Illinois Leading Lawyers Network* (2012)
- **Illinois Leading Lawyer (2011)**
Law Bulletin's *Illinois Leading Lawyers Network*
- **Rising Star**
Anti-Defamation League (2010)

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