Natalie M. Perry

Phone: (630) 510.4935
Email: nperry@rathjewoodward.com

As a certified public accountant, Natalie brings a deep understanding of the complex and ever-changing tax laws clients face. She serves as a strategic advisor to businesses and high net worth individuals on wealth management and preservation, including succession planning and estate planning and administration. In addition, Natalie advises business owners and individuals regarding asset protection and techniques to minimize estate, gift tax and income tax. Natalie works with clients on the development of charitable strategies, including the creation and administration of private foundations. She has experience in crafting settlements to resolve trust disputes, and in representing trustees in contested proceedings. She advises trustees and trust and estate beneficiaries in complex trust and probate administration as well as in IRS audits.

Practice Areas

- Estate Planning
- Trust and Estate Administration
- Tax
- Asset Protection
- Charitable Planning
- Fiduciary Counsel
- Income Tax Planning
- Planning for Closely Held Business Owners

Education

- DePaul University College of Law (J.D.)
- Indiana University (B.S, Accounting)

Bar Admissions

- State of Illinois

Board Service and Memberships

- Hinsdale Hospital Foundation Board Chair, January 2018 to present
- Hinsdale Hospital Foundation Board member, January 2016 to December 2017
- Member of Hinsdale Hospital Planned Giving Advisory Counsel, 2010 to 2014
- Illinois CPA Society, Estate and Gift Tax Committee, 2016 to present
- Chicago Estate Planning Council, 2007 to 2011; 2017 to present
- Chicago Bar Foundation Volunteer - Adoption Assistance Program, 1997 to 1999

Awards & Achievements

- Fellow, American College of Trusts and Estate Counsel**,** March 2016 to present
- The American College of Trust and Estate Counsel is a nonprofit association of lawyers and professors skilled and experienced in estate planning, probate procedure and the administration of trusts and estates. Its more than 2,500 members are called "Fellows" and practice throughout the world. Lawyers are elected to be Fellows based on their outstanding reputation, exceptional skill, and substantial contributions to the field through lecturing, writing, teaching and participating in bar activities.

Classes, Seminars & Presentations

- Speaker - American College of Trust and Estate Counsel Webinar; A Practical Guide to Working from Home for Solo and Small Firms During COVID-19, April 2020
- Speaker - Estate Planning Fundamentals Training Program
- Speaker - IICLE 62nd Annual Estate Planning Short Course
- “What You Need to Know about the Changes to the Illinois LLC Act" IICLE's 60th Estate Planning Short Course, May 2018
- “Probate Judges Panel” Moderator, IICLE's 59th Estate Planning Short Course, May 2017
- “Managing Ethics in Your Practice” IICLE's 59th Estate Planning Short Course, May 2017
- “Understanding Trusts for Accountants” Illinois CPA Society Tax Committee, January 2018
- “Preserving & Growing What Is Most Important to You" The Morton Arboretum Panel Discussion, September 2016
- “Managing a Family Business" Daily Herald Business Journal Forum, June 2016
- "2015 Recent Developments" Sikich LLP's 2015 Annual Tax Conference, November 12, 2015
- “Planning with Residential Real Estate" IICLE's 58th Estate Planning Short Course, May 2015
- "Understanding Life Insurance" IICLE Seminar Starting Points: Basic Estate Planning, August 2014
- "Client Intake and Counseling Procedures" IICLE Seminar Starting Points: Basic Estate Planning, August 2014
- “Anatomy of a Will” IICLE Seminar, October 2011
- CEPC Public Outreach at North Side Parent’s Network, September 2011 “Estate Planning for Parents”
- IICLE Estate Planning Short Course, May 2011, “Creative Ways to Limit the Value of a Gift"
- Client event for JPMorgan’s Private Wealth Management, May 2010, “Using Buy-Sell Agreements”

- IICLE Advanced Asset Protection Seminar, October 2010 "Asset Protection Planning with Domestic and Offshore Trusts"
- Co-Author, "Post Mortem Planning with Life Insurance," IICLE Guide to Postmortem Estate Planning, 2010, and supplement in February 2012
- "Drafting Trusts for Asset Protection" IICLE Advanced Asset Protection Seminar in 2006 and 2007