HANDLER THAYER, LLP

ATTORNEYS AND COUNSELORS AT LAW

MICHAEL D. WHITTY, C.F.P., J.D. **Partner**

Michael D. Whitty concentrates his practice in estate planning, taxation, and estate and trust administration. Mr. Whitty represents business owners, principals of venture capital and private equity funds, key executives, investors, and other high-net-worth individuals in planning for the preservation and transfer of their wealth. Specifically, he advises individuals and fiduciaries in the design and drafting of estate plans, wills, trusts, lifetime gifts, premarital agreements, and other estate planning documents.

Mr. Whitty has extensive experience with various types of trusts, family limited partnerships, corporate recapitalizations, shareholders' and redemption agreements, private annuities, installment sales, intra-trust sales and other transactions, self-canceling installment notes, and net gifts. He also reviews and manages estate and gift tax returns, including complex reporting and valuation issues.

Mr. Whitty consults with executors, administrators, guardians, and trustees in probate and trust administration. He supervises the drafting of estate administration documents and the filing of pleadings, motions and accountings with probate courts. He also advises clients in connection with litigation involving disputes between trustees and beneficiaries and in contested trust and tax matters, and he has served as an expert witness in such cases.

Mr. Whitty is a Fellow of the American College of Trust and Estate Counsel, a Fellow of the Family Firm Institute (holding certificates in Family Wealth Advising and Family Business Advising), a member of Attorneys for Family-Held Enterprises, and a member of the Chicago Estate Planning Council. He was an active member in the American Bar Association through August of 2013, in which he served on the Section Council and as Chair of the Wealth Planning and Nontax Issues Group of the Probate and Trust Division in the Section of Real Property, Probate and Trust Law.

Mr. Whitty served for three years as an adjunct professor at the Northwestern University School of Law, teaching a course titled "Federal Estate and Gift Taxation and Estate Planning." He is a Certified Financial Planning practitioner (CFP™) and a member of the Financial Planning Association of Illinois. Mr. Whitty has been named to Illinois Super Lawyers and Illinois Leading Lawyers. He also received an "AV Preeminent" Peer Rating in Martindale-Hubbell.

Mr. Whitty is a frequent speaker on estate and financial planning topics, appeared on the PBS program Nightly Business Report, and has been quoted in the Wall Street Journal. Mr. Whitty earned a BBA (1983) and J.D. (1988) from the University of Texas at Austin, and is a Certified Financial Planner™.

mwhitty@handlerthayer.com