

Anne Dickerson

Of Counsel



Connect with Anne

(312) 899-1684

adickerson@gouldratner.com

Services / Industries

Estate Planning & Wealth Transfer

Tax Planning & Structuring

Family Offices, Businesses & Entrepreneurs

Bio

Anne Dickerson is known for her thoughtful counsel and personal touch, guiding individuals and families through complex estate planning with clarity, care, and deep technical skill.

As an advisor to clients on their estate planning needs, Anne works closely with individuals, families and their businesses on the myriad legal issues, including saving estate taxes, succession planning and estate administration.

Anne blends her expertise in estate planning and estate administration with her empathetic approach. This enables her to not only handle very technical and sophisticated wealth transfer planning but also address the personal concerns of her clients. She listens, not just advises.

For over 25 years, Anne has been advising and working with clients on estate tax planning, wealth transfer and succession planning, such as:

- Designing and implementing lifetime gift and wealth transfer programs
- Forming family entities to help with the management and control of family investments
- Planning for succession of management of family owned businesses
- Utilizing generation skipping transfer ("GST") tax exemption for estate tax savings for generations by use of dynasty trusts
- Analyzing impact of estate planning on income taxes and advising on the most tax efficient strategies
- Implementing intra-family loans and sales to optimize the transfer of wealth to the next generation
- Forming private foundation, using donor advised funds and establishing charitable trusts to achieve a family's charitable goals
- Advising on best strategies for funding for the next generations' educational needs, including 529 plan accounts and education trusts

- Customizing terms of trusts to provide for special concerns and supplemental needs of a beneficiary
- Assisting the executor through the administration of an estate, including preparation of estate tax returns, post-mortem planning for the surviving family members, probate administration, and conducting family meetings regarding the estate administration process
- Coordinating with other Gould & Ratner LLP attorneys and paralegals to achieve a client's goals regarding real estate, corporate and entity compliance and titling of assets

Anne is a respected speaker on estate and tax planning, dealing with issues of aging, planned, and has presented numerous seminars to groups throughout the Chicago area.

Credentials

Education

DePaul University College of Law
University of Wisconsin-Milwaukee

Bar Admissions

Illinois

Affiliations

- American Bar Association
- Chicago Bar Association
- Chicago Estate Planning Council
- Planned Giving Committee of First United Church of Oak Park

Speaking Engagements

- [Does Your Estate Plan Talk With Your Investment Plan?, March 7, 2019](#)

Testimonials

"We were so pleased that we had you as our attorney – you knew [the decedent], you are a very caring person, were able to help us remain positive throughout the process, and someone who has been more of a friend than an attorney." *Executor of an estate*