

# Spotlight on Trusts & Estates Section Council Member Robert Kaufman

BY MIA O. HERNANDEZ

The Trusts & Estates Section Council has members from throughout the state of Illinois with a variety of professional achievements, skills, and practices. In this newsletter, we continue a monthly series of articles in a question-and-answer format that highlights the backgrounds, interests, and experiences of the members of the Trusts & Estates Section Council as a way to get to know more about them.

## Robert Kaufman

Fischel | Kahn,  
Chicago, Illinois



**Q:** How has the Illinois Trust Code impacted your trusts and estates practice, such as estate planning or trust administration? What are your recommendations to your clients?

**A:** *The notice and accounting provisions of the Act require client decisions. Being able to*

*keep the affairs of the first generation private from the second generation is something that needs to be addressed. The other aspect of the Act which has impacted the practice is the expansion of the right to enter into settlements and, with court approval, trust terminations.*

**Q:** How has the SECURE Act impacted your trusts and estates practice, such as estate planning, and recommendations to your clients?

**A:** *The inability to “stretch” the distributions for most beneficiaries has been a limiting factor. There is, however, more post-mortem income tax planning relating to the timing of distributions to the beneficiaries within the 10-year window.*

**Q:** How have you adapted your practice to the new laws and limitations in response to COVID-19? Do you have any recommendations for our readers?

**A:** *Although we have yet to use electronic Wills, we have taken advantage of the remote signing features of both the Executive Orders and the new legislation. However, we still*

*prefer “live” signings whenever possible. This business is all about relationships, and the signing ceremony has always been an important part of the estate planning practice. In our view, those handled remotely do not provide the same client connection.*

**Q:** Perhaps a colleague has given you sound advice or you’ve learned best practices through trial and error. What trusts and estates advice, practice tips or pitfalls for the unwary would you like to share with our readers?

**A:** *After you think you have completed a document which you believe is “client ready,” take a step back—perhaps a day later—and review it all again. Sometimes we get lost in our drafting and forget where we were trying to go.*

Please stay tuned for the next issue of the newsletter, when we will feature an additional member of the Trusts & Estates Section Council. ■



**AGRICULTURAL APPRAISALS  
OF ILLINOIS, INC.**

**Farm Equipment and Livestock Appraisals**

**MARSHALL ECCHER**  
(618) 444-4273 | [INFO@ECCHERINSURANCE.COM](mailto:INFO@ECCHERINSURANCE.COM)

Personal property appraiser for farm equipment & livestock. Thirty years' experience as a licensed insurance agent. Also available for insurance policy review.