



Jeffrey D. Shelley

Counsel

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Jeff advises individuals, entrepreneurs, and business owners on estate planning and administration, transfer taxation, and business planning. He frequently designs and implements comprehensive wealth transfer and business succession plans for high-net-worth individuals and families to effectively protect, manage, and transfer wealth while also minimizing the tax impact.

Additionally, Jeff represents executors and trustees in estate and trust administration, including federal and state estate tax returns, gift tax returns, and probate court matters. When necessary, he advocates for clients before the Internal Revenue Service on income and estate tax matters. He also assists businesses and their owners with transactions, tax planning, and succession planning.

Jeff's prior scientific, tax, and business background gives him unique insights when providing clients with personal and business solutions. He draws on his intellectual property background to counsel clients on protection strategies and has successfully represented clients in litigation across state and federal courts. Jeff has solid foundation in Big Four accounting and eight years of experience as an engineer and research scientist, including being a named inventor on several utility patents. He brings this diverse wealth of knowledge and experience to his legal practice.

Education

- Purdue University (B.S., 1998)
 - Chemical Engineering
- Loyola University Chicago School of Law (J.D., 2010)
- Northwestern University Pritzker School of Law (LL.M., 2013)

Bar Admissions

- Illinois
- United States Patent and Trademark Office

Professional Affiliations

Practices & Industries

- Trusts & Estates
- Business Succession Planning
- Charitable Planning
- Estate Plans & Tax Planning
- Fiduciary Services
- Marital Agreements
- Private Wealth Services
- Tax

- Chicago Bar Association
- Illinois State Bar Association
- Chicago Estate Planning Council

Awards & Honors

- Illinois Leading Lawyers, Individual and Trust, Will & Estate Planning Law (2017-2023)
- Named inventor for the following United States patents:
 - “Wipes Including Microencapsulated Delivery Vehicles and Phase Change Materials,” Patent Number US 7,914,891 (issued March 29, 2011)
 - “Multilayer Approach to Producing Homofilament Crimp Spunbond,” Patent Number US 7,025,914 B2 (issued April 11, 2006)
 - “Dual Capillary Spinneret for Production of Homofilament Crimp Fibers,” Patent Number US 6,830,640 B2 (issued December 14, 2004)
 - “In-Line Heat Treatment of Homofilament Crimp Fibers,” Patent Number US 6,632,386 B2 (issued October 14, 2003)
 - “Dual Capillary Spinneret with Single Outlet for Production of Homofilament Crimp Fibers,” Patent Number US 6,619,947 B2 (issued September 16, 2003)

Publications & Presentations

PRESENTATIONS

- “Wealth Planning and Business Entities – What’s in Our Toolbelt?” Co-Presenter, Chicago Estate Planning Council (April 2023)