Rick Y. Gelboim

CONTACT

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Rick advises high-net-worth individuals and business owners on a wide range of sophisticated wealth transfer, tax planning and charitable matters.

He designs and implements strategies to accomplish clients' taxable and personal estate planning goals, accounting for each client's unique circumstances, including tax minimization and wealth transfer objectives, business succession goals, charitable planning objectives, creditor protection and privacy concerns.

Rick's practice includes work with large families and family offices to coordinate inter-generational planning, including counseling younger generation family members on learning to be responsible stewards of wealth. He is experienced in the formation and operation of private trust companies, and he regularly represents fiduciaries in the administration of trusts and estates and the formation and operation of private foundations.

Education & Admissions

EDUCATION

J. D., Washington University School of Law, 2004

B.S., Syracuse

– magna cum laude

University School of Management, 2001

– Management Scholar (1 of 12 students recognized)

ADMISSIONS

Illinois, 2004

Presentations / Publications

Co-Author, “Litigating Disputed Estates, Trusts, Guardianships, and Charitable Bequests” Chapter 16 – Apportionment and Statutory Rights of Recovery, Illinois Institute for Continuing Legal Education (IICLE), 2023

Co-Author, “Apportionment of Estate Taxes and Administration Expenses,” Illinois Institute for Continuing Legal Education (IICLE) Estate Planning Short Course, 2011

Co-Author, “Estate Planning and Divorce: What Every Estate Planning Attorney Needs to Consider in Advising Single, Married and About-to-be-Married Clients,” Illinois Institute for Continuing Legal Education (IICLE) Estate Planning Short Course, 2006

Professional Activities

- Chicago Estate Planning Council

Community Activities

- Sylvia and Robert Scher Charitable Trust – Trustee