



FAMILY OFFICES

Burke, Warren, MacKay & Serritella represents a number of family offices throughout the United States with regard to various aspects of their operations, including income tax planning, estate and succession planning, structuring private investments, entity formation, asset protection, and litigation.

Our family office clients range from smaller offices with little or no full-time staff to multi-faceted offices with a large number of employees managing billions of dollars in investments. Burke Warren has specialists in many different areas of the law, including trust, corporate, and tax, with decades of experience in representing family offices. This makes Burke Warren uniquely suited to respond to a wide range of issues faced by family offices.

When representing family offices, we work closely with each family office's team of professional service providers, and we tailor our representation to their respective strengths and needs.

Experience

- Counsels stepparents through the court process of interfamily adoptions
- Advises clients on a variety of family wealth preservation matters, including estate and gift planning; estate, gift, and generation-skipping transfer tax issues; closely held businesses and succession planning; and privacy and asset protection

Insights

NEWS

Burke Warren a Proud Sponsor of Chicago Volunteer Legal Service
Vino + Gogh 2023 Event
News, [June 27, 2023](#)

PROFESSIONALS

Anna G. Kardaras
Karen K. MacKay
Mary Kruit McWilliams
Frederic A. Mendelsohn
Martin P. Ryan
Gregory M. Winters

RELATED PRACTICES & INDUSTRIES

Wealth and Succession Planning



Burke Warren a Proud Supporter of The American Red Cross of Greater Chicago 2023 Heroes Breakfast News, [April 27, 2023](#)

Burke Warren Proud to Participate in the Chicago Bar Foundation's 2023 Investing in Justice Campaign News, [April 20, 2023](#)

Burke Warren a Proud Sponsor of the Chicago Hope Academy 2023 Story of Hope Luncheon News, [April 11, 2023](#)

Burke Warren a Proud Member Firm of the Chicago Lawyers' Committee for Civil Rights News, [April 4, 2023](#)

Burke Warren a Proud Supporter of the GI Research Foundation 2023 Annual Ball News, [February 20, 2023](#)

Burke Warren a Proud Sponsor of 2023 Better Business Bureau of Chicago Annual Dinner Meeting News, [February 8, 2023](#)

Burke Warren a Proud Sponsor of One Tail at a Time 2023 Houndstooth Ball News, [February 7, 2023](#)

Burke Warren a Proud Sponsor of Boys & Girls Clubs of Chicago 2023 Youth of the Year Competition & Dinner News, [January 20, 2023](#)

Burke Warren Partner John Stephens Named Advisory Board Member of AbstoneLalley, Inc. News, [January 16, 2023](#)

Burke Warren a Proud Supporter of Direct Effect Charities 2022 "Letters to Santa" Program News, [December 15, 2022](#)

Burke Warren Elects Joshua Cauhorn as Director News, [December 12, 2022](#)

Burke Warren Elects Jessica Cox as Shareholder News, [December 12, 2022](#)

Burke Warren Elects Stephen Schuster as Shareholder News, [December 12, 2022](#)

Season's Greetings and Best Wishes for a Happy New Year From Burke Warren! News, [December 6, 2022](#)

Christine Eduardo and Mathew Musipa, Participants in Burke Warren's Fall 2022 3L Minority Internship Program, Accept Offers to Join the Firm News, [December 5, 2022](#)

Burke Warren a Proud Sponsor of Catholic Charities of the Archdiocese of Chicago 2022 Spirit of Saint Nicholas Ball News, [December 2, 2022](#)



Burke Warren a Proud Sponsor of Chicago Children's Museum 2022 Gala
News, [September 27, 2022](#)

Burke Warren a Proud Sponsor of After School Matters
News, [September 15, 2022](#)

Burke Warren 2022 3L Minority Internship Program Participant Mathew Musipa Quoted in U of I Blog
Article Entitled, "Immigration Law Clinic students win two asylum cases"
News, [September 15, 2022](#)

Burke Warren Selects Christine Eduardo and Mathew Musipa to Participate in the Burke Warren 2022
3L Minority Internship Program
News, [August 29, 2022](#)

Burke Warren a Proud Sponsor of Chicago Volunteer Legal Services Vino + Van Gogh 2022 Event
News, [August 24, 2022](#)

Burke Warren a Proud Sponsor of 2022 @gives back Golf Classic
News, [August 19, 2022](#)

Burke Warren a Proud Sponsor of 17th Annual Savills Landlord Challenge Charity Golf Event
News, [August 5, 2022](#)

Burke Warren Launch of New Firm Website Coincides with Firm's 30th Anniversary Milestone
News, [July 28, 2022](#)

Burke Warren Partner John Stephens Quoted in Crain's Chicago Article Entitled, "For Black lawyers,
roadblocks to partnership persist"
News, [June 10, 2022](#)

Burke Warren a Proud Supporter of the American Red Cross of Greater Chicago 2022 Heroes Breakfast
News, [May 4, 2022](#)

Burke Warren Cited In Chicago Tribune Article Regarding a Pro Bono Case Recently Undertaken by the
Firm
News, [May 3, 2022](#)

Burke Warren Welcomes Peter Ivancsits as Its Chief Financial Officer
News, [April 18, 2022](#)

Burke Warren Proud to Participate in the Chicago Bar Foundation's 2022 Investing in Justice Campaign
News, [April 6, 2022](#)

Burke Warren a Proud Member Firm of the Chicago Lawyers' Committee for Civil Rights
News, [February 21, 2022](#)

Burke Warren a Proud Sponsor of 2022 Entrepreneur and Family Business Council Gala
News, [January 25, 2022](#)



Adrian Atwater and Jolisa Warmack, Participants in Burke Warren's Inaugural 3L Minority Internship Program, Accept Offers to Join The Firm
News

ALERTS

Burke Warren Remains Fully Committed to Client Service Through Remote Working Capabilities
Alert, [March 18, 2020](#)

Long Term Attorney-Client Collaboration Leads to Legacy Planning
Alert, [October 25, 2016](#)