

## Bomie Leonard

she/her

### OF COUNSEL

Chicago

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## About Bomie

Trusted, tailored counsel for estate planning and wealth preservation

Bomie Leonard is a trusted counsel to individuals and families in wealth transfer and estate planning; federal estate, gift and generation-skipping tax planning; estate and trust administration; and business planning. She is also experienced in charitable planning, both for individual donors and charitable organizations. Bomie counsels clients on:

- **The minimization of estate, gift and generation-skipping transfer taxes**
- **Sophisticated estate planning techniques**
- **Creation and operation of family limited liability companies**
- **Planning for closely held businesses**
- **Charitable giving**

From structuring estate plans to family businesses, Bomie works closely with her clients to design, implement and maintain customized structures that are tailored to their goals.

## Experience in Action

- **Designs core estate planning documents**, including wills, trusts, powers of attorney for property, powers of attorney for health care and living wills.
- **Creates estate planning vehicles to accomplish clients' estate and tax planning goals**, such as qualified domestic trusts, irrevocable life insurance trusts, intentionally defective grantor trusts, special

### Education and Honors

DePaul University College of Law (J.D., 2008)

University of Illinois (B.S., 2002)

- Major: Mathematics

### Bar Admissions

Illinois





needs trusts and beneficiary defective inheritor's trusts.

- **Represents fiduciaries in estate and trust administration.**
- **Advises business owners on succession planning** to transition wealth to family members.
- **Creates tax-exempt entities**, including private foundations and public charities, and assists in obtaining and maintaining federal tax exemption.

## Capabilities

[Business Succession Planning](#)

[Charitable Planning](#)

[Estate, Trust & Wealth Preservation](#)

[Tax-Exempt Organizations](#)

## Professional & Civic Activities

- Prairie State Legal Services, volunteer attorney
- Chicago Bar Association, Estate Planning and Trust Law Committee, member
- DuPage County Bar Association, Tax Law Section, vice chair (2021-2022) and chair (2022-2023)

