

Panelists Bios

October 15 Meeting

Catherine M. Kane

Catherine is a tax principal for CliftonLarsonAllen, LLP in Oak Brook and also serves as their regional private client tax leader. Previously with KPMG, she has experience working with senior corporate executives with estate planning, personal income tax planning/compliance as well as business tax planning. A graduate of Loyola University, she is a member of the American Institute of Certified Public Accountants, the Illinois Society of Certified Public Accountants and the Chicago Estate Planners Council.

Ryan S. Smith

Ryan is a 2008 graduate of Pennsylvania State University and a 2011 graduate of the University of Pittsburgh School of Law. He joined Matlin Law Group in 2014 when he relocated to Chicago and focused his practice almost solely on Estate and Medicaid Planning, Estate and Trust Administration, and Probate. Ryan is licensed to practice in Illinois and is a member of the Greater North Shore Estate & Financial Planning Council and the National Academy of Elder Law Attorneys (NAELA).

Julia Santullano

Julia is the Director of Planning, LFN National Planning Team. She provides expertise to assist high net worth families, family offices, business owners, and individuals with multiple strategies for wealth transfer that meet objectives while reducing taxes. Julia has a J.D. degree from Northwestern University School of Law; and is a former adjunct professor in the LL.M. (Taxation) program at Chicago-Kent College of Law.