



# Lucy D. Bickford

PARTNER

Lucy develops personalized solutions to help her clients achieve their wealth and legacy planning goals. She enjoys distilling complex ideas to discuss planning opportunities with her clients and to illustrate the plans they have chosen to implement.



## Industries

[Family Office Services](#)  
[Private Companies](#)

## Practices

[Private Clients, Trusts & Estates](#)

## Education

Northwestern University Pritzker School of Law, JD,  
Northwestern University Law Review, Associate  
Editor, 2011  
Duke University, BA, Cultural Anthropology, 2002

## Offices

[Chicago](#)

## Phone

[312.258.5684](#)

## Email

[Lucy.Bickford@afslaw.com](mailto:Lucy.Bickford@afslaw.com)

Lucy advises on a range of estate and trust-related activity: ensuring plans appropriately reflect the family dynamic and unique assets, preserving wealth, administering estates and trusts, and resolving disputes. She also prepares prenuptial agreements, restructures existing trusts, uses nonjudicial settlement agreements, addresses cross-border planning issues, advises on retirement benefits, and helps to value closely-held companies.

Lucy has particular strength with numbers and modeling to help guide a client's course of action. She uses this skill to estimate transfer taxes, project the financial impact of particular planning opportunities, and track trust transactions, intra-family loans, and annuity payments.

Lucy strives to truly understand her families' interpersonal relationships. As a trusted adviser, her talent in capturing the family dynamic helps her develop plans that honor the family's values and desires. Her clients include individuals, multi-generation family groups, surviving spouses, and corporate and individual executors and trustees.

## Boards, Memberships & Certifications

- American Bar Association, Section on Real Property, Trust and Estate Law
- Chicago Estate Planning Council, Member
- Leadership Council on Legal Diversity, Pathfinders Program class of 2017
- Lake County Community Foundation, Grants Committee

## Publications, Presentations & Recognitions

### Publications

- "Onshore Trusts," (co-author) in Asset Protection Planning, IICLE (2014)

"Federalism and Subsidiarity: Perspectives from U.S. Constitutional Law," (co-author) in Federalism and Subsidiarity, NOMOS Vol. LV (2014)

### **Speeches & Presentations**

- "The Client Relationship: Ethical and Practical Considerations" (Guest Lecturer) Northwestern University Pritzker School of Law, Estate Planning (Apr. 12, 2021)
- "Northwestern Pritzker School of Law Panel Discussion," Hosted by the Chicago Estate Planning Council, Webinar (Feb. 25, 2021)
- "Drafting Estate Planning Documents," 2021 Estate Planning Fundamentals Course, Chicago Estate Planning Counsel, Webinar (Feb. 9, 2021)
- "Drafting Estate Planning Documents," 2020 Fundamentals Course Series, Chicago Estate Planning Council, Chicago, Ill. (Jan. 23, 2020)
- "Platinum Adventures Tax Seminar," Wintrust Community Banks, Lake Forest, Ill. (Oct. 30, 2018)
- "Trust Decanting in Illinois," Chicago Bar Association Probate Practice Committee, Chicago, Ill. (Jun 19, 2018)
- "The Emergent Advisor and Client," Northern Trust Advisor Summit, Chicago, Ill. (Jun. 7, 2018)
- "Diversity in the Field of Estate Planning," Northwestern Pritzker School of Law, Chicago, Ill. (Mar. 15, 2018)
- "Fiduciary Income Tax Considerations Under the Tax Cuts and Jobs Act," Monthly National Wealth Advisor Meeting, Northern Trust, Chicago, Ill. (Feb. 20, 2018)
- "Decanting of Irrevocable Trusts," Estate Planning Council of Greater Joliet November Meeting, Lockport, Ill. (Nov. 16, 2017)
- "Engaging with Millennials Now Strengthens Key Relationships," Fiduciary Advice in Action, Wells Fargo Webinar (Jul. 10, 2017)
- "Helping Clients Create Trusts Without Creating Trust Fund Babies," Chicago Bar Association YLS Estate Planning Committee, Chicago, Ill. (Mar. 7, 2017)
- "Planning for Portability," (co-presenter) The Chicago Bar Association Trust Law Committee Meeting, Chicago, Ill (Jan. 9, 2017)

### **Awards**

- Flex Success® Award, Diversity & Flexibility Alliance (2020)

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## **Bar Admissions**

[Illinois](#)