



Janet Rae Montgomery is of counsel to Nisen & Elliott, LLC. She concentrates her practice in estate planning and administration but has retired from active practice.

Miss Montgomery completed her undergraduate work at the University of Southern California and at Trinity College, University of Dublin, Dublin, Ireland, and earned her B.A. from USC (*magna cum laude*, Phi Beta Kappa) in 1973. She obtained her J.D. degree from Stanford Law School in 1976 where she was also a member of the Law Review. She is admitted to practice in Illinois and is on retired status for California. Before her current firm, she worked at Schiff Hardin & Waite in Chicago, and at other law firms in Oak Brook, Chicago, and San Francisco, including her own firm Daluga Boland & Montgomery, LLC until October 2019 when it merged with Nisen & Elliott.

Miss Montgomery is a retired Fellow of the American College of Trust and Estates Counsel, and is a past chair of the Committee on Fiduciary Income Taxation. She has also served on the Professional Responsibility Committee and the Asset Protection Committee of ACTEC, on the FATF Task Force of the College, and, as part of the administration of ACTEC, on the By-laws and Manual Committee. Miss Montgomery is also a member of the DuPage County Estate Planning Council (Past President) and the Chicago Estate Planning Council. She is a past chair of one of the Probate Divisions of the Chicago Bar Association.

Miss Montgomery is the past author of "Income Taxation of Trusts" in the Illinois Institute of Continuing Legal Education handbook *Trust Administration*, and the past author of "Protecting Family Assets" in the IICLE handbook *Asset Protection Planning*. From 2012 through 2022, she was an adjunct faculty member at Northwestern School of Law LLM program in Chicago teaching Income Taxation of Trusts and Estates.

She has served twenty-two times on the planning committee for the annual IICLE Estate Planning Short Course, which she has moderated five times. She has spoken and written extensively on estate planning topics, including at the IICLE Estate Planning Short Courses in 2004, 2005, 2006, 2007, 2010, 2012, 2013, 2014, 2016, 2017, and 2018. She gave a webinar for IICLE on FATF in 2013. Also in 2013, she spoke on a national teleconference for ALI-CLE about "Representing Clients with Diminished Capacity" and presented on the same topic for the ACTEC Professional Responsibility Committee. In addition to speaking at many other IICLE seminars on Estate Planning, Trust Administration and Estate Administration and at one of the Chicago Bar Association Trust Law Committee's annual seminar on the topic of "Ethics in Estate Planning and Administration: Effective Client Communications," she has also spoken at the DuPage County, North Shore, and Lake County Estate Planning Councils, the Chicago Suburban Planned Giving Council, the Illinois CPA Society, and for the Illinois Paralegal Society.

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