LINDSEY PAIGE MARKUS

Giving, Teaching and Estate Planning With Heart and Humanity

by Dave Argentar


AJ Kane

Torrential rain pounded relentlessly on the hood of the car in the driveway of the Highland Park home where Lindsey Paige Markus grew up. Inside the drenched vehicle sat one of her clients who needed to execute her will, trust and powers of attorney. A senior with limited mobility, the client could not make it downtown to Markus' office at Chuhak & Tecson, P.C. and was unable to provide witnesses at her home.

Markus suggested that they instead execute the documents at her parents' home, closer to where the client lived. She offered to have her parents serve as witnesses. Even without the soaking downpour outside, it would have been a challenge for the client to make it up the steps to the front door.

Armed with her file, notary stamp, an umbrella and her steadfast commitment to going above and beyond for her clients, Markus ran through the deluge, got into the car along with her parents, and took care of business.

"That's Lindsey in a nutshell," says Suzi Birz, a client of Markus who sat in the car with her mom that day. "She always goes the extra mile, always makes the extra effort, always does whatever it takes to make her clients lives better or easier, even if that means sitting in drenched clothes to sign papers in the back seat of a car."

Markus chuckles at the rainy memory but doesn't see it as anything particularly special. As an estate planning lawyer helping people navigate deeply personal and profoundly important matters, such investment in her clients is an indispensable part of her job.

"When clients come to me for estate planning, they have to get metaphorically naked," Markus says. "They have to open their books, tell me who they love and who they don't, and share their vision and hopes for their family. In turn, that experience, that intimate process with a client, is extremely special to me.

"Estate planning is not an abstraction or a matter of preparing forms," she adds. "The purpose and meaning in what I do come from getting to truly know my clients and understanding what they want their family legacy to be."

Building that connection and humanizing the process includes everything from having plenty of coloring books, crayons and treats at the ready if parents have to bring their children along for a meeting, to the unique request she makes when starting to work with a client.

"I ask for a family photo as part of my intake process," Markus says. "If I have a paralegal or associate working on a matter, they see who they are doing that work for—the smiling kids, the happy parents. It is a constant reminder of why it matters."

LEADING AND LISTENING IS HER JOB

In addition to a constellation of professional, educational and philanthropic endeavors, Markus heads her law firm's 22-attorney estate planning and asset protection group. She assists business owners and families in planning their estates, protecting assets, transferring wealth and minimizing taxation. She also works closely with clients to formulate succession plans, advise on business formation, maximize wealth preservation and minimize gift and estate taxation.

At Chuhak & Tecson, the firm where Markus has spent her entire legal career and where she hopes to spend the rest of it, she has built a robust and expansive practice and spearheaded an impressive array of client education, marketing, professional development and philanthropic initiatives. Her leadership and talents were recognized when she became the firm's first female shareholder, one of only two women attorneys to reach that pinnacle.

Her legal acumen complemented by her ability to communicate legal complexities with accessible clarity make her a frequent media guest, writer and speaker on estate planning and wealth protection. Those attributes, among many others, attracted one of Markus' earliest and longest-standing clients, a high-net-worth executive and founder of a large retail chain who had a diverse portfolio of assets and complicated estate planning needs to match.

"Lindsey delivers a continuous stream of good ideas, and she implements and executes those ideas in complex transactions on a regular basis. She doesn't tell me how we can't do something; she tells me how we will figure out a way to get it done," the client says.

"Equally important is Lindsey's ability to both connect and communicate. She is an excellent listener and has a fantastic ability to translate and explain to others what it is we are trying to accomplish in a way that is easy to digest."

BUSINESS AND BRAINS

The path Markus took to become a leader in her field and her firm was hardly a traditional one. Few estate planning lawyers have co-authored books about cognitive neuroscience or spent their mid-20s traveling the globe and meeting with c-suite executives at major telecom companies. Asset protection work usually doesn't follow a stint working with NASA, either.

For Markus, all of these experiences preceded the start of her legal journey at Loyola University Chicago School of Law. A self-proclaimed drama nerd in high school, she also found herself drawn to economics, the first class that really challenged her. When the time came for college, Markus had to make a choice.

"Theater was my love," she says. "I contemplated NYU's Tisch School of the Arts for drama, but my concern was that theater did not challenge me intellectually."

So, Markus went to Brandeis University where she took four years to complete a five-year combined B.A./M.A. program in international economics and finance, including spending a semester abroad at Bocconi University in Milan, Italy.

While family friends suggested that Markus go to law school, she wanted to instead take her credentials and talents to work in finance and business. Her first jobs included structuring asset-backed securities deals and institutional equity sales. But Markus soon found that she lacked the passion for these positions because they didn't afford her the opportunity to help individuals directly, a motivation that would come to define her career. Then, her cousin presented her with an "offer I couldn't refuse" to work at his start-up telecommunications company.

"I traveled the country and the world meeting with the heads of wireless and telecom powerhouses structuring massive and complex joint ventures," she recalls. In those meetings and doing those deals, Markus noted a constant presence that played a role in what her next career step would be.

"At every critical juncture, an attorney was present," she says. "Ultimately, I concluded that if I wanted to get the types of promotions and advancement that I envisioned for myself, I would need another degree for credibility. But going into law school, I had no idea whether I was going to go into business, finance or law afterward. I was open to see where it would lead me."

Before law school would lead her anywhere, Markus needed to take the LSAT. While preparing for that rite of passage, she embarked on a wildly different detour.

"My mom is a highly sought-after and accomplished doctor and consultant on cognitive brain science," she notes with pride. "She was in the middle of writing a book and needed help with her consulting practice."

That help included frequent trips to the Goddard Space Center, where the mother and daughter team worked with NASA's top scientists, physicists and engineers to use Dr. Markus' trailblazing brain exercises to create new neural pathways that would allow them to think more creatively and solve problems in

Markus has appeared on TV shows discussing financial and wealth preservation topics.


Dan Abrams and Nancy Grace of *Grace vs. Abrams* pose with Markus at a 2018 JUF dinner.

new ways.

This family partnership also included the unique experience of writing a book together. *Retrain Your Business Brain: Outsmart the Corporate Competition* applied her mother's cognitive restructuring training to the business world. Markus also co-authored *The Road Trip: A Parable About Where to Lead, When to Follow, and How to Get Out of the Way*.

EMPOWERING CLIENTS WITH KNOWLEDGE

While Markus continues to be a "guinea pig" for her mom's still-expanding practice, she turned her full attention to her legal career while at Loyola, including clerking at Chuhak & Tecson after her second year. It was the beginning of an enduring professional relationship with a firm that has given her the freedom and support to grow her practice and reach her goals.

"The firm was incredibly supportive of my ideas and goals from the beginning, but I also learned so much from the amazing attorneys at the firm and still do," she says. "It is a tremendous asset to be able to marshal the breadth of talent we offer to serve clients no matter the nature of their legal needs."

For Markus, a fan of meditation who loves to travel the globe, a fundamental part of how she serves clients began with one of her first assignments: updating her parents' estate plan.

"My parents did not have trusts in place. It quickly became apparent that their prior attorney never took the time to educate them on what they needed," she recalls. "I realized that if this could happen to two brilliant doctors, it could happen to anyone."

That is when Markus made it her mission to teach people about estate planning and the basic tools necessary to avoid probate and leverage tax planning.

"When I first started doing seminars and educational presentations, I didn't get a lot of business, but I firmly believe that if you do something good and teach someone something, the universe will give you something back. Teaching is a good deed, a mitzvah, whether I get a client from doing so or not."

Markus' desire to spread the estate planning gospel far and wide necessarily involved leveraging the internet. But early in her tenure at Chuhak & Tecson, Markus found the firm's website lacked educational resources for clients (a situation that has "exponentially improved in the years since," she emphasizes).

With the firm's blessing and support, the second-year associate launched her own estate planning education website for clients and strategic partners—lindseymarkus.com—which continues to do the good deed of bringing knowledge to others.

GIVING AS A WAY OF LIFE

Markus' abiding affection for her firm is grounded not only in its professional encouragement, collegial atmosphere and sense of family but also in its abiding commitment to service and philanthropy, a central part of Markus' identity since she was a child.

Her lifelong commitment to taking care of those in need and giving of herself to make others' lives better was as much a part of her childhood as her mom's famous gefilte fish.

"My parents and grandparents were incredibly generous," she recalls. "I grew up in a charitable environment where we were always cognizant of others who were in need. We were always encouraged to help, to give, to do anything we could for others. It was a way of life then and a big part of my life now."

It is a way of life at Chuhak & Tecson as well. "This is a group of wonderful people who see beyond the corners of our office and recognize we have a responsibility to help others," she says.

For example, the firm's Women Helping Women initiative, in which she is very active, helps women with professional advancement while simultaneously supporting charitable organizations dedicated to women's issues. It is one of many such programs at the firm.

Giving back and teaching, so central to Markus, converge in her role as a generous and involved mentor to younger attorneys, especially women.

"There were so many women and men who reached their hands out to help me. I feel I have an obligation to pay it forward," she says.

Outside of the firm, Markus gives her time and resources to a variety of philanthropic organizations. One group is the Jewish United Fund, which recognized her commitment and efforts in 2016 with its Davis, Gidwitz & Glasser Young Leadership Award, given for exemplary dedication and significant contributions to Chicago's Jewish community.

Markus' humanity, empathy and generosity leave an impression not only on those on the receiving end of her charitable efforts but on colleagues who also bear witness to her prodigious professional talents.

"Lindsey is brilliant—an incredibly meticulous, knowledgeable, responsive and big-picture thinker focused on positive resolutions," says Olga Stambler, a family law attorney who regularly works with Markus on prenuptial agreements and related matters. "But she also is so kind and has such a big heart. When prenups get signed in her office, for example, she has a bottle of champagne and little gifts to congratulate the couple.

"Lindsey is that rare combination—a top-flight lawyer with a genuine human touch." ■

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