Howard & Howard
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Matthew R. Case

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" I advise individuals, families, and organizations on estate planning, tax strategies, and nonprofit compliance, drawing on a background that spans private wealth services and complex tax matters."

Matt focuses his practice on estate planning, tax planning, and advising tax-exempt organizations, providing a comprehensive perspective on both personal and organizational tax strategy.

He counsels clients on the development of tax-efficient, asset-protective estate plans, often coordinating with multi-disciplinary advisory teams to implement tailored strategies. Matt prepares the full range of core estate planning documents, including revocable trusts, wills, and powers of attorney, as well as sophisticated irrevocable trusts designed for dynastic giving, estate and gift tax minimization, and life insurance planning. He also represents fiduciaries in the administration of trusts and estates, assisting with probate matters, ongoing trustee responsibilities, and trust and estate distributions.

Matt has significant experience structuring strategies to achieve advantageous estate tax, corporate income tax, transaction tax, and individual income tax outcomes at both the federal and state levels. He analyzes proposed corporate transactions and restructurings, applying the Internal Revenue Code, Treasury Regulations, case law, and private letter rulings to identify tax-efficient structures. His work includes evaluating mergers and acquisitions, stock and asset transactions, liquidation procedures, and corporate compensation arrangements. He also represents clients in IRS and state revenue department audits and disputes involving income tax and sales and use tax matters.

Business & Corporate	• Business and Corporate Tax • Trust and Estate Planning

In addition, Matt has advised public charities and private foundations on formation, governance, and ongoing compliance. He has prepared and reviewed Form 1023 applications for organizations seeking federal tax-exempt status and assists clients in ensuring compliance with Section 501(c)(3) and related provisions of the Internal Revenue Code.

Matt earned his J.D., along with a Tax Law Certificate, from Loyola University Chicago School of Law. He is admitted to practice in Illinois and before the United States Tax Court. He received his B.A. from the University of Michigan.

Education

- Loyola University Chicago School of Law, 2018
    - J.D.
- University of Michigan, 2015
    - B.A.

Memberships

- American Bar Association
- Illinois Bar Association
- Chicago Bar Association

Admissions

- Illinois
- United States Tax Court