



MINNEAPOLIS

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Minneapolis, MN 55402

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Assistant
Lisa Peterson Hall
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PRACTICE AREAS

Closely Held and Family
Business

Trusts, Estates & Legacy
Planning

Charitable Gift Planning

Trust & Estate Litigation

EDUCATION

University of Minnesota Law
School, J.D., *cum laude*

St. John's University, B.A.,
summa cum laude, with all-
college honors and distinction in
the field of management

James D. Lamm

Partner | james.lamm@lathropgpm.com

Jim Lamm is an estate planning and tax attorney. He focuses his practice on estate planning, tax planning, family business succession planning, probate and trust administration, and charitable giving. Jim works with executives, entrepreneurs, professional athletes, high-net-worth families, and family offices to achieve family goals, pass on family values, and plan for family businesses.

Jim plans and prepares foundational estate planning documents for families including wills, revocable trusts (living trusts), financial powers of attorney, health care directives (living wills), and beneficiary designations for life insurance and retirement plans. Jim also works with families and family business owners to plan and implement trusts for children or grandchildren, irrevocable life insurance trusts (ILITs), spousal lifetime access trusts (SLATs), grantor retained annuity trusts (GRATs), qualified personal residence trusts (QPRTs), intentionally-defective grantor trusts (IDGTs), dynasty trusts, installment sales, split-dollar life insurance agreements, private foundations, donor advised funds, charitable remainder trusts, charitable lead trusts, prenuptial agreements, family limited partnerships and limited liability companies, and buy-sell agreements.

Jim also works with families, family offices, and other professionals to help them through the probate and estate settlement process, as well as to administer trusts, prepare tax returns, and resolve trust, estate, and tax disputes.

Court Memberships

- Minnesota

- North Dakota
- South Dakota
- U.S. District Court for the District of Minnesota
- U.S. Tax Court

Honors

- Recognized as Leading Practitioner of Private Wealth Law by *Chambers High Net Worth Guide*, 2020
- American College of Trust and Estate Counsel (ACTEC): Technology in the Practice Committee, chair; Artificial Intelligence Task Force, co-chair
- *The Best Lawyers in America*®, 2010-2021
- AV® Preeminent™ Peer Review Rated Attorney, Martindale-Hubbell
- "Minnesota Super Lawyer®," Thomson Reuters, 2013-2019
- "Top Rated Lawyers™ in Trusts & Estates," American Lawyer Media & Martindale-Hubbell, 2013
- "Minnesota Rising Star®," Thomson Reuters, 2004, 2006, 2009, 2011

Events

- "Digital Passing," Gray Plant Mooty Advisors Conference
May 15, 2013
- "Digital Passing," Gray Plant Mooty Client Conference
May 15, 2013
- Digital Death—Succession Planning for Passwords, Online Accounts, and Digital Property
July 26, 2012
- "Digital Death: Estate Planning for Passwords, Online Accounts, and Digital Property," Leave a Legacy Minnesota, Saint Cloud, Minnesota
May 16, 2012
- "Digital Death: Estate Planning for Passwords, Online Accounts, and Digital Property," American Bar Association Cyberspace Law Institute, San Francisco, California
January 20, 2012

- “Estate Planning for Passwords, Online Accounts, and Digital Property,” 56th Annual Estate Planning Seminar, Seattle, Washington
November 1, 2011
- “Your Digital Afterlife: Estate Planning for Passwords, Online Accounts, and Digital Property,” Central Coast Paralegal Association, San Luis Obispo, California
October 6, 2011
- “Digital Death: Estate Planning for Passwords, Online Accounts, and Digital Property,” Minnesota State Bar Association, Minneapolis, Minnesota
September 29, 2011
- “Raiders of the Life Insurance Trust: Holy Grail or Temple of Doom?,” 37th Annual Minnesota Probate & Trust Law Section Conference
June 6, 2011
- “Estate Planning 2.0: Digital Property and Tech-Savvy Clients—Time to Reboot Your Practice,” 45th Annual Heckerling Institute on Estate Planning, Orlando, Florida
January 12, 2011
- “Thanks But No Thanks—Disclaiming Assets, Interests, and Powers in Uncertain Times,” U.S. Bank Teleconference
July 21, 2010
- “Advising Clients and Fiduciaries with Significant Digital Property and Intellectual Property Interests,” 36th Annual Minnesota Probate & Trust Law Section Conference
June 7-8, 2010
- “Estate Planning in Uncertain Times: Large Estate Panel,” Minnesota Continuing Legal Education
October 19, 2009
- “Estate Planning in a Low Interest Rate Environment,” Hennepin County Bar Association
September 22, 2008
- “Tips and Traps of the Generation-Skipping Transfer (“GST”) Tax: Are Your Clients’ Trusts GST Tax Exempt?,” Securian Financial Group Webcast/Teleconference
June 16, 2008
- “Top Issues in Estate Planning Practice,” University of Minnesota Law School
March 8, 2006

- “Estate Planning for Executives: What Corporate Counsel Need to Know,” Gray Plant Mooty Corporate Counsel Breakfast Group Presentation
February 20, 2008
- “Top Issues in Estate Planning Practice,” University of Minnesota Law School
March 5, 2007
- “Estate Planning in Times of Change,” UBS Financial Services Client Seminar
February 27, 2007
- “Business-Related Issues for Estate Planners: Choice of Entity Under Minnesota Law,” Minnesota Probate & Trust Law Section Conference
June 19-20, 2006
- “Top Issues in Estate Planning Practice,” University of Minnesota Law School
December 6, 2005
- “Business-Related Issues for Estate Planners: Choice of Entity Under Minnesota Law,” Minnesota Continuing Legal Education
October 24, 2005
- “New Circular 230 Issues in Estate Planning,” Hennepin County Bar Association
September 26, 2005
- “Estate Planning and Florida Snowbirds,” M&I Bank Client Seminar
September 21, 2005
- “Asset Protection Ideas for Risk Management,” Ethics and Estate Planning Symposium
May 5, 2005
- Minnesota Marital Deduction Handbook Q&A Session,” Minnesota Continuing Legal Education
October 5, 2004
- “Minnesota Marital Deduction Handbook,” Minnesota Continuing Legal Education
September 13, 2004
- “Recent Developments in Family Limited Partnerships,” Meristem Annual Family Office Conference
June 10, 2004
- “Recent Developments in Family Limited Partnerships,” St. Paul Financial and Estate Planning Council
February 17, 2004

- "Estate Planning That Endures in Times of Change," Minneapolis Foundation
November 13, 2002
- "Business Succession Planning," Joint Client Seminar with LarsonAllen
October 24, 2002
- "Irrevocable Life Insurance Trusts," Firm Client Seminar
July 19, 2001
- "Generation-Skipping Transfer Tax Issues for Irrevocable Life Insurance Trusts," Minnesota Probate & Trust Law Section Conference
June 8, 2001
- "The Practice of Law in America," West Publishing
December 4, 1998

Professional Affiliations

- Hennepin County Bar Association, Probate and Trust Law Section, past cochair, 2011-2012; cochair, 2010-2011; vice cochair, 2009-2010; and program cochair, 2008-2009

Community Involvement

- St. John's University Planned Giving Committee, Member

Presentations

- Presenter, "Protecting Client Data: Ethics, Security and Practicality," 47th Annual Midwest Midsouth Estate Planning Institute, July 31, 2020
- "Securing Client Data: Ethical Rules and Practical Tips," ACTEC Great Lakes Regional Meeting, December 14, 2019
- "The Impact of Artificial Intelligence on Estate Planning and Administration," ACTEC Annual Meeting, La Quinta, California, March 22, 2019
- "Protecting Client Data: Ethics, Security, and Practicality for Estate Planners," 53rd Annual Heckerling Institute on Estate Planning, Orlando, Florida, January 16, 2019
- "Planning for Digital Property: The Future Ain't What it Used to Be," Estate Planners Council of Southern Minnesota, February 27, 2018
- "How to Manage Your Digital Identity," Minnesota CLE Webcast, February 13, 2018

- "Saving My Digital Assets: Time to Reboot Your Practice," 7th Annual Hawaii ACTEC Fellows Planning Conference, Honolulu, Hawaii, August 25, 2017
- "Planning for Digital Property: The Future Ain't What it Used to Be," The 43rd Annual Probate & Trust Law Section Conference, St. Paul, Minnesota, June 13, 2017
- "15 Practical Tips for Staying Secure Online," Associated Bank Seminar, Edina, Minnesota, May 25, 2017
- "Planning for Digital Property: The Future Ain't What it Used to Be," 51st Annual Heckerling Institute on Estate Planning, Orlando, Florida, January 12, 2017
- "Protecting Client Data: Ethics, Security, and Practicality for Estate Planners," American Law Institute CLE Webcast, November 10, 2016
- "Minnesota's Revised Uniform Fiduciary Access to Digital Assets Act," Minnesota CLE Webcast, September 9, 2016
- "Ten Things to Know About Minnesota's New Trust Code," Minneapolis, Minnesota, August 12, 2016
- "A Tangled Web: Tax and Estate Planning for Digital Property," Wealth Enhancement Group Seminar, November 12, 2015
- "A Tangled Web: Tax and Estate Planning for Digital Property," Robert W. Baird & Co. Seminar, November 7, 2015
- "A Tangled Web: Tax and Estate Planning for Digital Property," Wealth Enhancement Group Seminar, September 3, 2015
- "Ethics and Data Encryption for Lawyers," ACTEC Summer Meeting, Quebec City, Quebec, Canada, June 19, 2015
- "A Tangled Web: Tax and Estate Planning for Digital Property," 33rd Annual MNCPA Estate & Personal Financial Planning Conference, Brooklyn Center, Minnesota, June 15, 2015
- "South Dakota Trust Laws," Minneapolis, Minnesota, May 5, 2015
- "Fifteen Traps for Irrevocable Life Insurance Trusts," Minneapolis, Minnesota, March 24, 2015
- "Digital Passing: Your Client is Six Feet Under, But His Data is in the Cloud," Wilmington Trust's 2014 T&E Symposium for the Professional Advisor, North Palm Beach, Florida, November 7, 2014
- "Digital Passing: Oh, What a Tangled Web We Weave," U.S. Bank Teleconference, October 30, 2014

- "Uniform Fiduciary Access to Digital Assets Act," Data Privacy, Security, and Access in the Digital Age, Office of the Revisor of Statutes, St. Paul, Minnesota, October 9, 2014
- "Digital Passing: Oh, What a Tangled Web We Weave," Riverbridge Partners Seminar, September 22, 2014
- "Digital Passing: Oh, What a Tangled Web We Weave," Minnesota Paralegals Association Seminar, September 10, 2014
- "Digital Passing: Oh, What a Tangled Web We Weave," Minnesota CLE Webcast, May 15, 2014
- "Introducing the Uniform Fiduciary Access to Digital Assets Act," California State Bar Association's Executive Committee of the Trusts and Estates Section, Dana Point, California, April 26, 2014
- "Digital Passing: Oh, What a Tangled Web We Weave," 58th Annual Estate Planning Seminar, Seattle, Washington, October 21, 2013
- "Ethics, Security, and Practicality," Minneapolis, Minnesota, October 4, 2013
- "2013 Minnesota Gift & Estate Tax Law Changes," U.S. Bank Seminar, June 6, 2013
- "2013 Minnesota Gift & Estate Tax Law Changes," CliftonLarsonAllen Seminar, May 30, 2013
- "Estate Planning Strategies for Large Estates: The Bigger They Are, The Harder They Fall, Unless We Work Hard to Make Them Small," 2013 Annual Meeting of The American College of Trust and Estate Counsel, Maui, Hawaii, March 8, 2013
- "Digital Death: Estate Planning for Passwords, Online Accounts, and Digital Property," University of Miami School of Law, Law Review Symposium, Coral Gables, Florida, February 15, 2013
- Digital Death—Succession Planning for Passwords, Online Accounts, and Digital Property, July 26, 2012
- "Digital Death: Estate Planning for Passwords, Online Accounts, and Digital Property," Leave a Legacy Minnesota, Saint Cloud, Minnesota, May 16, 2012
- "Digital Death: Estate Planning for Passwords, Online Accounts, and Digital Property," American Bar Association Cyberspace Law Institute, San Francisco, California, January 20, 2012
- "Estate Planning for Passwords, Online Accounts, and Digital Property," 56th Annual Estate Planning Seminar, Seattle, Washington, November 1, 2011

- "Your Digital Afterlife: Estate Planning for Passwords, Online Accounts, and Digital Property," Central Coast Paralegal Association, San Luis Obispo, California, October 6, 2011
- "Digital Death: Estate Planning for Passwords, Online Accounts, and Digital Property," Minnesota State Bar Association, Minneapolis, Minnesota, September 29, 2011
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- "Top Issues in Estate Planning Practice," University of Minnesota Law School, December 6, 2005

- "Business-Related Issues for Estate Planners: Choice of Entity Under Minnesota Law," Minnesota Continuing Legal Education, October 24, 2005
- "New Circular 230 Issues in Estate Planning," Hennepin County Bar Association, September 26, 2005
- "Estate Planning and Florida Snowbirds," M&I Bank Client Seminar, September 21, 2005
- "Asset Protection Ideas for Risk Management," Ethics and Estate Planning Symposium, May 5, 2005
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