



## Ann B. Burns

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### MINNEAPOLIS

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### Assistant

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### PRACTICE AREAS

Closely Held & Family Business

Trust & Estate Litigation

Trusts, Estates & Legacy  
Planning

Charitable Gift Planning

Litigation

### COURT MEMBERSHIPS

- Minnesota
- Wisconsin
- U.S. Court of Appeals for the  
Eighth Circuit
- U.S. Tax Court

### EDUCATION

University of Wisconsin Law  
School, J.D., 1981

Iowa State University, 1978,  
undergraduate degree

Ann Burns assists business owners and families in matters pertaining to estate and charitable gift planning, business succession planning, estate and trust administration, and fiduciary and tax litigation.

As a certified public accountant (inactive), Ann provides her clients with legal insight informed by a practical understanding of the intricacies of tax law and financial planning. She represents multi-generational families of wealth throughout the country, assisting and guiding them in their relationships with trustees and other advisors. Ann also represents individual and corporate trustees in fiduciary controversies in state and federal courts.

While Ann's clients value the depth of her legal acumen, they especially appreciate her clarity and sensitivity in navigating the unique interpersonal dynamics that can impact the estate-planning process. She collaborates closely with her clients and their advisors to ensure a long-term plan that not only satisfies their financial needs, but also reflects their core personal values.

In recognition of her knowledge in the field, Ann was elected President of the American College of Trust and Estate Counsel, for which she has served as a regent since 2013. Ann is also a past practice group chair at the firm. In addition, she has been a featured speaker for the Salvation Army's annual Estate and Charitable Gift Planning Institute.

Outside her legal practice, Ann served as a member of the board of trustees for The Minneapolis Foundation, where she provided oversight and guidance for the foundation's efforts to promote education, economic development, and civic engagement in the Minneapolis

## CLERKSHIP(s)

Law clerk for the Honorable  
Judge Donald R. Ross, Eighth  
Circuit Court of Appeals

community.

## Recent Presentations

- **Heckerling Institute on Estate Planning, University of Miami School of Law**, frequent presenter from 2005-present on subjects including tax controversies; Section 2053 regulations; integrating estate plans with business succession planning; disclaiming assets, interests, and powers; and using exclusions
- **The Salvation Army - Annual Estate & Charitable Gift Planning Institute Seminar**, frequent co-presenter from 2014 to 2021 on subjects including representing families and fiduciaries; planning strategies for the small, medium, and large estate; tailoring estate planning by adapting traditional techniques; and estate planning check-ups
- **American College of Trust & Estate Counsel**, frequent co-presenter from 2012-present on subjects including handling the toughest issues in the operation and succession of a family business; estate planning best practices for large estate business interest owners; and estate planning strategies in current tax law environment; and tax litigation
- **Annual Kansas City Estate Planning Symposium**, presenter from 2016 to 2021 on subjects including family businesses and ethical dilemmas that estate and business planners face
- **American Bar Association - Real Property, Trust & Estate Law Section CLE**, panelist in 2017 on disclaimers

## Presentations

- Presenter, "Business Succession Planning - It's a Family Affair," 60th Annual Heart of America Tax Institute, November 3, 2023
- Presenter, "Case Studies on Family Business Succession Planning - What Works and What Doesn't," 42nd Annual Kansas City Estate Planning Symposium, May 5, 2023
- Podcast Guest, "Supporting and Mentoring Female Estate Planning Attorneys," ACTEC Trust and Estate Talk, December 13, 2022
- Co-presenter, "Friday Night Lights - an Illuminating Look at Closely Held Entities - Considerations in the Liquidation of a Closely Held Entity and Other Alternatives," ACTEC Fall Meeting, November 4, 2022

- Co-presenter, "Business Planning Strategies - Tips, Traps, and Common Mistakes in Estate Planning for Business Owners," Estate Planning Council of St. Louis, October 24, 2022
- Presenter, "Keeping It All in the Family: Business Succession Planning Strategies to Keep the Family and the Business Intact," 40th Kansas City Estate Planning Symposium Annual Conference, April 23, 2021
- Co-presenter, "Saving the Best for Last: Ethical Dilemmas Estate and Business Planners Face," 36th Annual Kansas City Estate Planning Symposium, April 2017
- Panelist, "Disclaimers," American Bar Association Real Property, Trust & Estate Law Section CLE, February 2017
- "Don't Put Your Clients' Estate Plans on the Shelf," What Matters Most 2016 in Trusts & Estates Practice, Minnesota CLE, October 2016
- Co-presenter, "The Annual Estate Planning Check-Up," 24th Annual Estate & Charitable Gift Planning Institute Seminar, The Salvation Army, September 2016
- "Family Businesses: Keep It, Sell It, Give It Away," 35th Annual Kansas City Estate Planning Symposium, April 2016
- Co-presenter, "Tailoring the Estate Planning Wardrobe: Adapting Traditional Techniques for a Better Fit," 23rd Annual Estate & Charitable Gift Planning Institute Seminar, The Salvation Army, September 2015
- Co-presenter, "Entering and Exiting Estate Planning Strategies in the Current Tax Law Environment," ACTEC Annual Meeting, March 2015
- "Representing Families and Fiduciaries," 22nd Annual Estate & Charitable Gift Planning Institute Seminar, The Salvation Army, September 2014
- Co-presenter, "Where Do We Go From Here? Planning Strategies for the Small, Medium and Large Estate," 22nd Annual Estate & Charitable Gift Planning Institute Seminar, The Salvation Army, September 2014
- Co-presenter, "Estate Planning Best Practices for Large Estate Business Interest Owners," ACTEC Summer Meeting, June 2012
- Co-presenter, "How to Handle the Toughest Issues in the Operation and Succession of a Family Business," ACTEC Summer Meeting June 2012

- "They Say You Can't Take It With You--But How Do You Give It Away? Using The \$5 Million Exclusion Amount," 46th Annual Heckerling Institute on Estate Planning, University of Miami School of Law, January 2012
- Co-presenter, "Integrating the Estate Plan with Business Succession Planning," 44th Annual Heckerling Institute on Estate Planning, University of Miami School of Law, January 2010
- Co-presenter, "Qualified Disclaimers--What Part of 'No' Don't You Understand," 44th Annual Heckerling Institute on Estate Planning, University of Miami School of Law, January 2010
- "Thanks, But No Thanks--Disclaiming Assets, Interests, and Powers," 44th Annual Heckerling Institute on Estate Planning, University of Miami School of Law, January 2010
- "Deductive Reasoning: Section 2053 Proposed Regulations--Take the Guesswork out of Deductible Claims," 41st Annual Heckerling Institute on Estate Planning, University of Miami School of Law, January 2008
- "Life Settlements, an Overview," ACTEC Business Planning Committee, March 2007
- Moderator, "A Wild Decade at Mid-Life," 40th Heckerling Institute on Estate Planning, University of Miami School of Law, January 2006
- "Mathematics and Economics for Estate Planners," Cannon Financial Estate Planning Webcast, May 2005
- "Tax Controversy Work: Winning Cases through Mastering Procedure," 39th Heckerling Institute on Estate Planning, University of Miami School of Law, January 2005
- "The IRS Appeals Process," ACTEC Annual Meeting, June 2003

## Publications

- Co-Authored, "Business Succession Planning Answer Book," Commerce Clearing House, January 2011
- "Disclaiming Assets, Interests, and Powers," LexisNexis 2010 Heckerling Institute on Estate Planning, Volume 44, January 2010
- "The Increased Exemption Creates Opportunity," Trusts & Estates, March 2009
- "Section 2053 Proposed Regulations," Trusts & Estates, July 2008
- "Deductible Reasoning: Section 2053 Proposed Regulations--Take The Guess Work Out of Deductible Claims," LexisNexis 2008 Heckling Institute on Estate Planning, Volume 42, January 2008

## Client Alerts And Blog Posts

- Philanthropy in the COVID-19 World: What Gives?\*
- April 9, 2020

## In The News

- ACTEC Features Partner Ann Burns in Special Series, 'Considerations in the Possible Liquidation of a Closely Held Entity and Other Alternatives'
- January 24, 2023
- TIME Magazine Quotes Ann Burns on End-of-Life Planning
- January 26, 2022
- The New York Times Quotes Ann Burns on Rises in Federal Estate Tax
- September 15, 2010
- Forbes Quotes Ann Burns on Estate Taxes
- June 28, 2010
- The New York Times Quotes Ann Burns on Estate Tax
- February 17, 2010

## News Releases

- Lathrop GPM Partner Ann Burns Awarded Minnesota ICON Award
- December 14, 2023
- Eight Lathrop GPM Attorneys Named Lawyer of the Year, 89 Ranked as The Best Lawyers in America©
- August 17, 2023
- Chambers High Net Worth 2023 Legal Guide Ranks Lathrop GPM LLP and 10 Attorneys
- July 20, 2023
- Lathrop GPM Attorneys Named 2023 Minnesota Super Lawyers and Rising Stars
- July 18, 2023
- Six Lathrop GPM Attorneys Named Lawyer of the Year, 95 Ranked as The Best Lawyers in America©
- August 18, 2022
- Lathrop GPM Attorneys Named 2022 Minnesota Super Lawyers and Rising Stars
- July 18, 2022
- Lathrop GPM Achieves Chambers High Net Worth 2022 Rankings in Three States, for Nine Attorneys

July 14, 2022

- Seven Lathrop GPM Attorneys Named Lawyer of the Year, 100 Ranked as The Best Lawyers in America©  
August 19, 2021
- Lathrop GPM Achieves Chambers High Net Worth 2021 Rankings in Three States, for Nine Attorneys  
July 22, 2021
- Lathrop GPM Attorneys Named 2021 Minnesota Super Lawyers and Rising Stars  
July 22, 2021
- Lathrop GPM Partner Ann Burns Elected President of American College of Trust and Estate Counsel  
March 31, 2021
- Lathrop GPM Attorneys Named to The Best Lawyers in America©, Lawyer of the Year, and Ones to Watch for 2021  
August 20, 2020
- Lathrop GPM Attorneys Named 2020 Minnesota Super Lawyers and Rising Stars  
July 21, 2020
- Lathrop GPM Achieves Rankings in Three States with Six Attorneys Recognized in Chambers High Net Worth 2020  
July 9, 2020
- Gray Plant Mooty Attorneys Named The Best Lawyers in America© 2020  
August 15, 2019
- Gray Plant Mooty Attorneys Named 2019 Minnesota Super Lawyers and Rising Stars  
July 5, 2019
- Gray Plant Mooty Attorneys Recognized in The Best Lawyers in America© 2019  
August 15, 2018
- Gray Plant Mooty Attorneys Named 2018 Minnesota Super Lawyers and Rising Stars  
July 5, 2018
- 37 Gray Plant Mooty Attorneys Recognized in The Best Lawyers in America 2018  
August 15, 2017
- 43 Gray Plant Mooty Lawyers Named 2017 Minnesota Super Lawyers and Rising Stars  
July 5, 2017

- 35 Gray Plant Mooty Attorneys Recognized in The Best Lawyers in America 2017  
August 15, 2016
- 40 Gray Plant Mooty Lawyers Named 2016 Minnesota Super Lawyers and Rising Stars  
July 5, 2016
- 36 Gray Plant Mooty Attorneys Recognized in The Best Lawyers in America 2016  
August 17, 2015
- 38 Gray Plant Mooty Lawyers Named 2015 Minnesota Super Lawyers and Rising Stars  
July 09, 2015
- 33 Gray Plant Mooty Attorneys Recognized as Best Lawyers  
August 19, 2014
- 40 Gray Plant Mooty Lawyers Named 2014 Minnesota "Super Lawyers" and "Rising Stars"  
July 7, 2014
- 27 Gray Plant Mooty Attorneys Named 2012 "Minnesota Super Lawyers"  
July 9, 2012
- Gray Plant Mooty's Ann Burns and Laura Hein Recognized as Two of Minnesota's Top 50 Women Attorneys  
April 5, 2012
- 22 Gray Plant Mooty Attorneys in 2012 Edition of "Best Lawyers in America"  
September 2, 2011
- 25 Gray Plant Mooty Attorneys Named 2011 "Minnesota Super Lawyers"  
July 12, 2011
- 23 Gray Plant Mooty Attorneys in 2011 Edition of "Best Lawyers in America"  
August 9, 2010
- 24 Gray Plant Mooty Attorneys Named 2010 "Super Lawyers"  
July 16, 2010

### Professional Affiliations

- American College of Trust and Estate Counsel (ACTEC), immediate Past President, 2022; President, 2021; President-elect, 2020; vice president, 2019; treasurer, 2018; secretary, 2017; regent, 2013-present; fellow, 1995-present; Business Planning Committee, chair,

2014-2018

### Community Involvement

- The Minneapolis Foundation, Board of Trustees, 2011-2020
- Greater Twin Cities United Way, Founding Member, Women's Leadership Council and Annual Campaign Cabinet, 2009-2011

### Honors

- Selected among *The Best Lawyers in America*®, 1995-2024
- Fellow, The American College of Trust and Estate Counsel (ACTEC)
- *Chambers High Net Worth Guide*, "Leading Practitioner of Private Wealth Law," 2019-2023
- *Thomson Reuters*, "Minnesota Super Lawyer®," 2012-2023
  - "The Top 50 Women," 2010-2023
  - "The Top 100," 2017-2023
  - "The Top 100 Women," 2005-2009
- *Minnesota Lawyer*, "Minnesota ICON," 2023
- *Minnesota Monthly*, "Minnesota's Top Lawyers," 2022