



## James D. Lamm

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### MINNEAPOLIS

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Minneapolis, MN 55402

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*Assistant*  
Lisa Peterson Hall  
612.632.3393

### PRACTICE AREAS

Closely Held and Family  
Business

Trusts, Estates & Legacy  
Planning

Charitable Gift Planning

Trust & Estate Litigation

### COURT MEMBERSHIPS

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

### 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

Jim Lamm is a third-generation Minnesota 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 is nationally known for his speaking and writing on advanced estate planning and tax topics, and he has been interviewed and quoted by *The Wall Street Journal*, *The New York Times*, *USA Today*, *The Washington Post*, *Star Tribune*, *The Boston Globe*, *The Seattle Times*, *The Associated Press*, *Reuters*, *Forbes* magazine, *Intellectual Property Magazine*, *Barron's*, *Bloomberg*, *InvestmentNews*, *Kiplinger's*, *Morningstar*, *Pew Research Center*, *Twin Cities Business*, *Minneapolis/St. Paul Business Journal*, *MSNBC*, *KSTP* television, *KMSP* television, *National Public Radio*, and more. Jim is a Fellow in the American College of Trust and Estate Counsel (ACTEC), and he is a member of ACTEC's Board of Regents. He served as a past chair of ACTEC's Technology in the Practice Committee, a past chair of ACTEC's Digital Property Committee, and a past co-chair of ACTEC's Artificial Intelligence Task Force. Jim also has been an adjunct associate professor teaching an Estate Planning and Drafting seminar at the University of Minnesota Law School.

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.

## 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

## Presentations

- Panelist, "Estate Planning for Intellectual Property," ACTEC CLE Seminar, March 5, 2023
- Co-presenter, "I'll be Back! Protecting Yourself and Your Clients from Cyber-Attack," ACTEC Annual Meeting, March 10, 2021
- Co-presenter, "Estate Planner Q&A: Answers to Questions You've Been Meaning to Ask," U.S. Bank Private Wealth Management, February 10, 2021
- Presenter, "Securing Client Data and Teleworking: Ethical Concerns and Practical Tips," 46th Annual Notre Dame Tax & Estate Planning Institute, October 30, 2020
- 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

- "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, 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, 2008
- "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, 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

### Client Alerts And Blog Posts

- Estate Planning 2022 Federal Tax Update  
January 4, 2022
- Philanthropy in the COVID-19 World: What Gives?\*
- Trustees Should Evaluate Income Tax Impact of Fielding v. Commissioner  
July 19, 2018
- "Digital Passing: Oh, What a Tangled Web We Weave," Minnesota Continuing Legal Education  
May 15, 2014
- TECP E-Alert: Big Changes to Minnesota Estate and Gift Taxes  
April 2, 2014
- E-Alert: Estate Planning Matters! Minnesota Tax Law Changes  
May 31, 2013

- "Digital Death: What to Do When Your Client Is Six Feet Under But His Data Is in the Cloud," 47th Annual Heckerling Institute on Estate Planning, Orlando, Florida  
January 17, 2013
- "To My Son I Leave All My Passwords," Trusts and Estates  
July 1, 2009
- "Minnesota Marital Deduction Handbook," Lead Editor, Minnesota Continuing Legal Education  
January 1, 2004

### In The News

- "Estate Planning for Investors Who Hold Crypto and NFTs,"  
Barron's  
May 4, 2022
- "'Blue Wave' Could Lead to Crackdown on GRATs," Tax Notes  
October 31, 2018
- Trust, Estate & Charitable Planning Group Presents Tax Updates  
April 6, 2018
- "Plan Ahead in Your Will for Your Virtual Self," Reuters  
February 8, 2018
- "Bitcoin Should Be Part of Estate Planning, Too," Barron's  
February 1, 2018
- "Estate planning for the digital era," Fidelity Viewpoints  
March 20, 2017
- "Why Can't Artists Deduct Donated Artworks from Their Taxes?"  
Hyperallergic  
March 22, 2016
- "Plan Your Digital Legacy, and Update Often," New York Times  
November 11, 2015
- "Privacy Rights After Death," Communications Daily  
August 7, 2015
- "Table of Experts: Wealth Managers," Minneapolis/St. Paul  
Business Journal  
February 27, 2015
- "After You Die, There's a Debate About Your Data,"  
BloombergBusiness  
February 13, 2015
- "Facebook Creates a 'Living Will' For Users' Accounts After Death,"  
The Boston Globe  
February 13, 2015

- "How to bequeath Emblem3 to loved ones" MarketWatch (NY)  
November 3, 2014
- "The Digital Footprints That We Leave Behind" Forbes  
October 31, 2014
- "Sorting Out Digital Assets After Death," StarTribune blog  
October 2, 2014
- "Family wants access to U freshman's digital data after fatal fall,"  
Fox 9 TV News  
September 10, 2014
- "Your Immortal Digital Identity Could Haunt You," Twin Cities  
Business  
August 2014
- "Tech Seeks Life After Death for Accounts," TheHill.com  
July 24, 2014
- Gray Plant Mooty Attorneys Assist with New Uniform Law  
Commission Digital Assets Policy  
July 22, 2014
- "How to Digitally Avoid Taking It to the Grave" The New York Times  
July 2, 2014
- "Uniform Fiduciary Access to Digital Assets Act," Bloomberg BNA  
Electronic Commerce & Law Report  
June 18, 2014
- "Bitcoin Is Creating New Headaches for Estate Planners, Though It  
May Someday Cure Them," Bloomberg BNA Electronic Commerce  
& Law Report  
May 14, 2014
- "Estate Planning: Protecting Your Digital Assets," Ally Bank's  
Straight Talk Blog  
May 9, 2014
- "What Happens to Your Facebook When You Die?" The Washington  
Post  
May 7, 2014
- "Understanding Proposed Legislation for Digital Assets," Journal of  
Financial Planning  
April 1, 2014
- "When Heirs Must Battle For Access To E-mail Accounts," Forbes  
December 11, 2013
- "After The Gold Rush: Domain Names Have Lost Their Glitter,"  
Forbes  
November 22, 2013

- "Online Security Begins at Home: 5 Tips for Protecting Yourself on the Internet," Yahoo! Voices  
July 23, 2013
- "Social Media Causing An Evolution In The Way We Grieve," Daily Local News (West Chester, PA)  
February 26, 2013
- "Facebook is Changing The Way We Grieve," Star Tribune  
February 17, 2013
- "Life and Death Online—Who Controls a Digital Legacy?," Wall Street Journal  
January 5, 2013
- "Passing Down Digital Assets," Wall Street Journal  
August 31, 2012
- "A Golden Age Of Gift Giving," The Wall Street Journal  
May 25, 2012
- "If A Business Owner Dies, Who Can Access The Web?," The Wall Street Journal  
May 21, 2012
- "Keep Your Digital Life Alive, After Death," Reuters  
February 17, 2012
- "What Happens To Your 'Digital Assets' When You Die?," The Wall Street Journal Law Blog  
February 13, 2012
- "Yahoo Mail Not To Blame For Web Problems," Star Tribune  
February 7, 2012
- "Who Controls Your Facebook Page If You Die?," Star Tribune  
January 24, 2012
- "Electronics And Estates," The Globe and Mail  
January 9, 2012
- "Digital Estate Planning Often Forgotten," The Seattle Times  
January 7, 2012
- "Securian Trust Expand Focus Beyond Millionaire's Club," Minneapolis/St. Paul Business Journal  
October 14, 2011
- "Cyberlife Could Go On Without You," The Columbus Dispatch  
May 10, 2011
- "Your Digital Afterlife," WFAE 90.7 FM's Charlotte Talks program on Charlotte, NC, NPR affiliate  
April 15, 2011

- "Password Protection," Forbes  
April 11, 2011
- "Welcome To My World, Won't You Come On In...," Intellectual  
Property Magazine  
April 2011
- "Six Ways To Store Securely The Keys to Your Online Financial Life,  
" Forbes.com  
February 15, 2011

## News Releases

- 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
- Attorneys Recognized for Pro Bono Service  
July 16, 2018
- Gray Plant Mooty Attorneys Named 2018 Minnesota Super Lawyers and Rising Stars  
July 5, 2018
- Gray Plant Mooty's Coleman and Lamm Receive 2018 Lexology Client Choice Award  
February 8, 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

- 22 Gray Plant Mooty Attorneys in 2012 Edition of “Best Lawyers in America”  
September 2, 2011
- Thirteen Gray Plant Mooty Attorneys Named 2011 “Minnesota Rising Stars”  
August 9, 2011
- 23 Gray Plant Mooty Attorneys in 2011 Edition of “Best Lawyers in America”  
August 9, 2010

### 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

### Honors

- *Chambers High Net Worth Guide*, "Leading Practitioner of Private Wealth Law," 2020-2022
- American College of Trust and Estate Counsel (ACTEC): Fellow and member of the Board of Regents
- Selected among *The Best Lawyers in America*®, 2010-2023
  - "Lawyer of the Year," 2023
- AV® Preeminent™ Peer Review Rated Attorney, Martindale-Hubbell
- "Top Rated Lawyers™ in Trusts & Estates," American Lawyer Media & Martindale-Hubbell, 2013
- "Minnesota Super Lawyer®," *Thomson Reuters*, 2013-2022
  - "Minnesota Rising Star," *Thomson Reuters*, 2004, 2006, 2009, 2011
- "Minnesota's Top Lawyers," *Minnesota Monthly*, 2022