James D. Lamm

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MINNEAPOLIS
80 South Eighth Street
3100 IDS Center
Minneapolis, MN 55402

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Lisa Peterson Hall
612.632.3393

PRACTICE AREAS

Closely Held & 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 10, 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, Securit 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?*
  April 9, 2020
- 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

- Lathrop GPM Partner James Lamm Elected to American College of Trust and Estate Counsel Executive Committee
  March 12, 2024
- 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
- 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

- American College of Trust and Estate Counsel (ACTEC): Fellow, Member of the Board of Regents and Executive Committee
- *Chambers High Net Worth Guide*, "Leading Practitioner of Private Wealth Law," 2020-2023
- Selected among *The Best Lawyers in America*©, 2010-2024
  - Litigation - Trusts and Estates "Lawyer of the Year," 2023
- AV® Preeminent™ Peer Review Rated Attorney, Martindale-Hubbell

- *Minnesota Monthly,* "Minnesota's Top Lawyers," 2022
- *Thomson Reuters*, "Minnesota Super Lawyer®," 2013-2023
    - "Minnesota Rising Star," 2004, 2006, 2009, 2011
- "Top Rated Lawyers™ in Trusts & Estates," American Lawyer Media & Martindale-Hubbell, 2013