



MINNEAPOLIS

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Minneapolis, MN 55402

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PRACTICE AREAS

Trust & Estate Litigation

Trusts, Estates & Legacy
Planning

Nonprofit & Tax-Exempt
Organizations

COURT MEMBERSHIPS

- Minnesota
- North Dakota

EDUCATION

University of Minnesota Law
School, J.D., *cum laude*, 1998

Marquette University, B.A.,
magna cum laude, 1995

Marya P. Robben

Partner | marya.robben@lathropgpm.com

Marya Robben practices in the areas of estate planning, estate and gift taxation, fiduciary representation, probate administration, trust formation and administration, and guardianship and conservatorship law. Marya leads the firm's Trusts, Estates & Legacy Planning Practice Group.

A Fellow in the American College of Trust and Estate Counsel (ACTEC), Marya frequently writes and speaks on estate planning and probate matters, advanced planning matters (including generation skipping transfer tax planning and intentionally defective grantor trusts), marital deduction planning, disclaimer planning, business succession planning, and navigating fiduciary duties to other professionals. For ten years, she served as an adjunct professor at the University of St. Thomas School of Law, teaching courses on Wills, Trusts & Estates.

Representative Experience

- Assisted private client in forming irrevocable grantor trusts for gift planning and structured funding to include part gift and part sale in a way that transferred assets free of all estate and gift transfer taxes for multiple generations through South Dakota dynasty trust.
- Represented professional trust company to obtain court approval for termination of contested trust, approval of proposed distribution plan, and approval of trustee actions where trust had existed for several decades with illiquid assets.
- Guided closely held business owners through creation of irrevocable trusts as part of holistic estate plan prior to liquidity event so as to save several million dollars in future estate taxes.
- Assisted physician and spouse in creating understandable, holistic estate plan to address needs of family, including minor children, in event of incapacity or death and sheltering life insurance assets in

an irrevocable life insurance trust so that policy proceeds would not be subject to state or federal estate taxes.

- Navigated court proceedings to assist trust beneficiary in changing professional trustee where terms of trust instrument were silent regarding removal of trustee and appointment of new trustee.
- Assisted individual attorney-in-fact in navigating powers and duties while facing uncooperative and problematic co-fiduciary where assets included revocable trust, investment accounts, real estate, and other assets.

Events

- Trustee Duties and Diligence – Tips for Driving Defensively in the Current Climate
April 30, 2020
- The New Tax Plan and What It Means for You
March 14, 2018

Presentations

Select speaking engagements include:

- Co-Presenter, "Trustee Duties & Diligence: Tips for Driving Defensively in the Current Climate," North Dakota Bankers Association Tri-State Conference, April 28, 2020
- Presenter, "On the Edges of Capacity - Implications for Estate Planning" Minnesota CLE January 2021; October 2020
- Panelist and moderator, "State Taxation of Irrevocable Trusts" American Bar Association Conference, May 2019
- Presenter, "Large Estates Panel: Flaunting Flexibility - Keeping Your Options Open In a Temporary World," MSBA Probate & Trust Law Section Conference, June 4, 2018
- Presenter, "GST Tax for Trust Administrators," Red River Valley Estate Planning Council; Minnesota CLE, September 1, 2017
- Presenter, "Disclaimers - Planning and Administration," Minnesota CLE, Hennepin County Bar Association, Minnesota CLE and MSBA's 37th Annual Probate & Trust Law Section Conference, December 2016, June 2016, December 2011, June 2009
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Presenter, "Navigating Fiduciary Duties for Family Offices," South Dakota Trust Company, May 1, 2014

- Presenter, "Unwinding, Revising & Administering The Unwanted Irrevocable Trust Plan," American College of Trust & Estate Counsel, December 1, 2013
- Presenter, "Selected Issues in Post-Mortem Planning," American Bar Association Real Property, Trust & Estate Section, September 1, 2013
- Presenter, "Dynasty Trusts," American Bar Association Taxation Section, October 1, 2011
- Presenter, "§ 674: Planning for Grantor Trusts," American Bar Association Section of Taxation, May 1, 2011
- Presenter, "The Uses and Considerations of GRATs and QPRTs," American Bar Association Taxation Section, June 1, 2010
- Presenter, "Fiduciary Litigation: The Best Defense is a Good Offense," Minnesota CLE and MSBA 36th Annual Probate & Trust Law Section Conference, June 1, 2010
- Presenter, "Estate Planning for Business Owners," Ramsey County Bar Association, May 1, 2010

Client Alerts And Blog Posts

- Estate Planning 2022 Federal Tax Update
January 4, 2022
- TECP Alert: U.S. Supreme Court Clarifies the Minimum Connection for the Taxation of Trusts
June 21, 2019
- Trustees Should Evaluate Income Tax Impact of Fielding v. Commissioner
July 19, 2018

- “Minnesota Enacts State Gift Tax and Expands State Estate Tax for Residents and Nonresidents,” Wealth Management newsletter
July 2, 2013
- “Estate Planning with Life Insurance Policies – Reduce Potential Liability Claims While Improving a Client’s Estate Plan,” American Bar Association Probate and Property Journal
January 1, 2010

In The News

- Bloomberg Wealth Quotes Marya Robben on Proposed Tax Changes
December 20, 2021
- The New York Times Quotes Marya Robben on Tax Rate Changes
January 22, 2021
- The New York Times Quotes Marya Robben on Potential Changes to Estate Tax
January 15, 2021
- Bloomberg Wealth Quotes Marya Robben on Estate Planning Amid Election Season
November 5, 2020
- Trust, Estate & Charitable Planning Group Presents Tax Updates
April 6, 2018

News Releases

- 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 Names Marya Robben as Leader of Trusts, Estates & Legacy Planning Practice
May 4, 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
- 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 Elects New Shareholders for 2019
January 7, 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
- Gray Plant Mooty Adds Marya Robben to Trust, Estate & Charitable Planning Group
June 1, 2017

Professional Affiliations

- Minnesota State Bar Association, Probate & Trust Law Section, Litigation Committee Co-Chair, 2019-current
- North Dakota State Bar Association
- Hennepin County Bar Association
- American Bar Association, Real Property, Trust and Estate Law Section, Generation Skipping Transfer Tax Committee, Former Co-Chair, 2017-2019

Community Involvement

- Normandale Community College Foundation, Board Member, Treasurer, 2016-2017

- St. Therese Catholic Church of Deephaven, Sacristan, Usher, Greeter, Event Volunteer

Honors

- American College of Trust and Estate Counsel (ACTEC), Fellow
- Recognized as Leading Practitioner of Private Wealth Law by *Chambers High Net Worth Guide*, 2021
- "Minnesota Super Lawyer," Thomson Reuters, 2015-2021
 - "The Top 50 Women," 2019-2021
- "Minnesota Rising Star," Thomson Reuters, 2006-2008, 2011-2012
- *The Best Lawyers in America*®, 2015-2022
- AV® Preeminent™ Peer Review Rated from Martindale-Hubbell
- Dean's Award for Outstanding Teaching, University of St. Thomas School of Law, 2013