



## Beth T. Morrison

Counsel | [beth.morrison@lathropgpm.com](mailto:beth.morrison@lathropgpm.com)

### MINNEAPOLIS

80 South Eighth Street  
3100 IDS Center  
Minneapolis, MN 55402

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### Assistant

Shelly Parker  
612.632.3413

### PRACTICE AREAS

Trusts, Estates & Legacy  
Planning

### COURT MEMBERSHIPS

- Minnesota
- North Dakota

### EDUCATION

University of St. Thomas, J.D.,  
*cum laude*

University of Minnesota, Twin  
Cities Campus, B.A., *summa*  
*cum laude*

Beth Morrison works with clients, individuals, and businesses alike, to implement tax-efficient estate plans. Her experience includes drafting trusts, wills, real estate documents, and other estate planning tools. Beth has established guardianships for people with disabilities and developed estate plans utilizing special needs and supplemental needs trusts to fulfill clients' specific estate planning goals. In addition, she advises clients on business matters related to formations and buy-sell agreements.

### Representative Experience

- Developed and implemented tax-efficient estate plans.
- Drafted trusts, wills, real estate documents and other estate planning tools.
- Represented clients throughout the probate process.
- Advised clients on business needs including LLC formations and review buy-sell agreements.
- Completed Minnesota and Federal estate tax returns.
- Established guardianships for people with disabilities and developed estate plans utilizing special needs and supplemental needs trusts to fulfill clients specific estate planning goals.
- Drafted estate plans for individuals and families at all levels of complexity, ranging in value from very modest to ultra-high net worth.
- Developed strategies to reduce or eliminate federal estate and gift taxes.
- Filed applications for tax exempt status of charities and foundations with the IRS and advised on other charitable planning techniques.

## Events

- Wealth, Legacy and the Next Generation Webinar  
May 11, 2023
- Guardianship and Less-Restrictive Alternatives  
June 22, 2022

## Presentations

- What Every Lawyer Needs to Know About Estate Planning and Probate, Minnesota CLE, 2020 and 2021
- "Your First Irrevocable Trust," Minnesota Probate and Trust Conference, June 10, 2019
- "Estate Planning Tools," Hallberg Engineering, January 1, 2016
- "Estate Planning for Families with Special Needs Children," Down Syndrome Parent Support Group, January 1, 2016
- "End of Life Workshop," Thrivent Financial, January 1, 2015

## Publications

- Co-author, "Tax-free Rollovers of 529 Plan Funds to Roth IRAs Allowed Under Secure 2.0," Tri-Bar Trust & Probate Section Newsletter, April 25, 2023
- Co-author, "Undue Influence in Estate Planning: When Help Goes Too Far," Hennepin County Bar Association, April 23, 2020
- Co-author, "Overview and Sources of Minnesota Trust Law Chapter," Minnesota Trust Administration Deskbook, August 2018
- Co-author, "The Prince Estate: How Intestacy Works, How it Could Work, and How it Fails as an Estate Plan," Mitchell Hamline Law Review Volume 43 Issue 6, March 31, 2018

## Client Alerts And Blog Posts

- Tax-free Rollovers of 529 Plan Funds to Roth IRAs Allowed Under Secure 2.0  
March 15, 2023

## News Releases

- Lathrop GPM Attorneys Named 2023 Minnesota Super Lawyers and Rising Stars  
July 18, 2023
- Gray Plant Mooty Welcomes New Trust, Estate, and Charitable Planning Attorney

January 14, 2019

### Professional Affiliations

- Standpoint (formerly known as Battered Women's Legal Advocacy Project), former board member
- Tubman Family Alliance, Pro Bono Safety Project
- Street Law Project, former volunteer
- University of St. Thomas Advanced Trial Advocacy Class, volunteer

### Community Involvement

- Minnesota AIDS Project Volunteer, Minnesota Legal Aid Volunteer
- Minneapolis Women's Rotary Club, president 2017-2018, board of directors 2014-2018
- Wills for Heroes, volunteer
- Minneapolis Alumni Club of Pi Beta Phi, fundraising chair, 2014-2016
- Children's Law Center- volunteer attorney for children in the foster system;
- Impact100 - Founding Board Member and Governance Chair, Minneapolis Chapter

### Honors

- *Thomson Reuters*, "Minnesota Rising Star," 2023
- North Star Lawyer
- Jack DeWitt Pro Bono Attorney of the Year, 2016
- Dean's Award in Estate Planning, University of St. Thomas School of Law