Lisa A. Loree

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Assistant
Jackie Baker
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PRACTICE AREAS

Trusts, Estates & Legacy Planning

EDUCATION

University of Missouri-Kansas City, A.S., 1986

University of Missouri-Kansas City, Paralegal Certificate, 1987

Lisa Loree is a probate and tax paralegal with over 30 years of firm experience. She is experienced with:

- Administration of estates and trusts
- Preparation of pleadings to open and maintain probate estates in both Missouri and Kansas
- Collection, maintenance and transfer of assets
- Accounting and administrative functions
- Docket control and maintenance
- Preparation of federal and state estate tax returns, gift tax returns, individual income tax returns, fiduciary income tax returns, and private foundation tax returns

Lisa also has familiarity with corporate transactions, including:

- Preparation and filing of documents necessary to form and maintain entities in various states
- Preparation and filing of various UCC forms
- Preparation of various state filings
- Assisting in the preparation of audit response letters
- Maintenance and updating of corporate databases

News Releases

- Lathrop GPM Represents Endpoints News in Its Partnership With the Financial Times
  April 27, 2023

Professional Affiliations

- Kansas City Paralegal Association