Lathrop GPM

Justin W. Whitney

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PRACTICE AREAS

Community Banking

Entrepreneurial Services

Trusts, Estates & Legacy Planning

Trust & Estate Litigation

Closely Held & Family Business

COURT MEMBERSHIPS

- Kansas
- Missouri

EDUCATION

University of Missouri-Kansas City Law School, L.L.M. Taxation, 2015

"I view myself as a professional who can organize complex affairs for my clients and become a turn-key resource for them on their estate planning and business affairs," said Justin. Clients have praised Justin for being "highly knowledgeable, patient and well-organized," as well as responsive, and quick to point out how they've recommended him to others.

Justin Whitney helps families and business owners organize and transition their complex estates in a tax-efficient manner with an acute awareness of the unique circumstances of their family and station in life, delivering substantive expertise and common sense as an advisor, a resource, and a friend. He is a partner in Lathrop GPM's Trust, Estates & Legacy Planning group.

With significant experience advising high-net-worth families on complex estate and gift tax planning and business succession planning, Justin leverages his background as a certified public accountant and his legal master's degree in taxation to deliver tax-focused solutions to clients. His day-to-day practice involves the preparation of all varieties of trusts including:

- Basic revocable trusts
- Charitable remainder trusts
- Grantor-retained annuity trusts
- Intentionally defective grantor trusts
- Irrevocable generation-skipping transfer tax-exempt dynasty trusts
- Life insurance trusts
- Qualified personal residence trusts

Washburn University School of Law, J.D. *cum laude*, 2007

University of Kansas, B.S. Accounting, 2004; B.S. Business Administration, 2002

- Spousal lifetime access trusts

Justin also advises business owners on tax-free reorganizations of corporations, partnerships and limited liability companies, business succession planning, the formation of family limited partnerships, and advanced gifting strategies. He has an active trust and estate litigation practice where he advocates in court disputes between trustees and beneficiaries.

In addition to guiding clients on the technical nature of tax, estate and business laws, Justin is well-versed in complex interfamily dynamics and strives to promote family connectivity through communication and transparency. He regularly counsels business owners in ways to ensure that the fortune they spent a lifetime creating doesn't destroy the family relationships they treasure the most.

Clients count on Justin to organize their affairs, plan their wealth and business transition, and then remain a constant and available resource for the rest of their lives as questions arise and life circumstances change. He endeavors to be the "keeper of the facts" for estate planning clients and a guide for their surviving family members. Clients count on Justin to manage their affairs for their families when their stage in life leaves them without the physical strength or mental acuity to do it on their own.

WHEN ASKED …

Why did you become a lawyer?

I enjoy the opportunity to connect with clients and help them solve complex problems.

What do you do outside of work?

When Justin is not serving clients, he enjoys being with his wife and helping their children discover and achieve their dreams. Justin is also passionate about advocating for the underserved and disadvantaged members of the Kansas City community through mentoring, public service and pro-bono advocacy.

Events

- Truman Heartland Community Foundation's Professional Advisor Seminar Series
  May 9, 2024
- Tax Reform Seminar
  March 28, 2018

Presentations

- Presenter, "Estate Planning Update," Recent Developments in Federal Taxes, UMKC School of Law Seminar, January 27, 2024
- Co-presenter, "Estate and Charitable Gift Planning with Retirement Assets and Closely-Held Businesses," Truman Heartland Community Foundation, October 26, 2023
- Presenter, "The Art of Estate Planning: Mastering the Complexities for Your Clients," Enterprise Elite Mastermind Webinar, August 24, 2023
- Presenter, "The Five Questions a Charity Should Ask When Presented with a Charitable Bequest," Mid-American Charitable Gift Planners, March 10, 2023
- Co-presenter, "Business Planning Strategies - Tips, Traps, and Common Mistakes in Estate Planning for Business Owners," Estate Planning Council of St. Louis, October 24, 2022
- Presenter, "Trust Drafting - Tax and Non-Tax Considerations," Kansas City Estate Planning Symposium, Fundamentals of Estate Planning, October 20, 2022
- Presenter, "Trust Litigation: The Who, What, Where and How," Kansas City Metropolitan Bar Association Probate and Trust Litigation CLE Program, November 12, 2021
- Presenter, "Estate Planning Issue Spotting for Financial Advisors," September 20, 2021
- Presenter, "Key Implications, Changes and Planning Strategies of the Tax Reform Bill," March 28, 2018
- Presenter, "Estate Plan Issue Spotting for Financial Advisors", Financial Planning Association of Greater Kansas City, May 10, 2023

Publications

- Author, "Estate Planning with Family Limited Partnerships," *Estate Planning Journal, Vol. 49, No. 6,* June 2022

- Co-author, "Revocable Trusts: Kansas, Practical Law Trusts & Estates," *Thomson Reuters*, 2020
- Co-author, "Power of Attorney (Kansas), Practical Law Trusts & Estates," *Thomson Reuters,* 2020
- Author, "Trust Modifications, Trust Terminations and Valid Settlement Agreements, Kansas Probate & Trust Administration after Death," *8th Edition, Kansas Bar Association*, 2018
- Co-author, "Estate Planning after the Tax Cuts and Jobs Act of 2017," *Ingram's*, 2018
- Co-author, "Has Your Estate Plan Entered the Digital Age?," *Ingram's*, 2018
- Co-author, "Revocable Trusts: Missouri," Practical Law Trusts & Estates, *Thomson Reuters*, 2018
- Co-author, "Power of Attorney (Missouri)," Practical Law Trusts & Estates, *Thomson Reuters*, 2018

Client Alerts And Blog Posts

- Reporting Rules for the Corporate Transparency Act Continue to Evolve
  April 23, 2024
- Legacy & Tax Planning in a Pandemic
  April 27, 2020
- Estate Planning Alert: Impact of the SECURE Act on Inherited IRAs
  January 15, 2020

In The News

- Kansas City Business Journal Features Partner Justin Whitney as New Member of Civic Council of Greater Kansas City's 2023-2024 Leadership Class
  June 27, 2023
- Courtney Conrad and Justin Whitney Provide Guest Column to Ingram's Magazine
  March 15, 2018

News Releases

- Six Lathrop GPM Attorneys Named Lawyer of the Year, 95 Ranked as The Best Lawyers in America©
  August 18, 2022
- Five Attorneys Promoted to Partnership
  January 10, 2022

- Missouri & Kansas Super Lawyers Recognizes 34 Lathrop GPM Attorneys
  November 16, 2020
- Justin Whitney Joins Lathrop Gage's Wealth Strategies Team
  December 30, 2019
- Super Lawyers Recognizes 47 Lathrop Gage Attorneys in Missouri and Kansas
  November 14, 2018
- Super Lawyers Recognizes 57 Attorneys from Lathrop Gage in Missouri and Kansas
  November 9, 2017
- Lathrop Gage Welcomes Justin W. Whitney in Kansas
  July 13, 2016

Professional Affiliations

- Civic Council of Greater Kansas City, Kansas City Tomorrow Leadership Class, 2023-2024
- Heart of America Fellows Institute, The American College of Trust and Estate Counsel (ACTEC)
- Kansas Bar Association
- Missouri Bar
- Kansas City Metropolitan Bar Association

Community Involvement

- Children's Mercy Planned Giving Council, Member

Honors

- Selected among *The Best Lawyers in America®,* "Ones to Watch," 2023-2024
- American College of Trust and Estate Counsel, Heart of America Fellows Institute, 2021
- Selected for Missouri/Kansas *Super Lawyers* "Rising Stars" 2014-2019
- Myron E. Sildon Excellence in Estate Planning Award, Kansas City Estate Planning Society