



**2025**

Private Client Services  
Practice Group Directory

## Partners

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**Alma Soongi Beck**  
Redwood Shores  
650.804.7613 | [Email](#) | [Bio](#)  
State Bar Admission(s): CA

- LGBTQ+ estate planning and domestic partnership and unmarried couple planning
- Advanced gift planning, including multigenerational planning
- Land back to Indigenous communities



**Martin Behn**  
Redwood Shores  
650.804.7645 | [Email](#) | [Bio](#)  
State Bar Admission(s): CA

- Basic and advanced estate planning
- Complex and contentious trust and estate administration
- International estate planning, German fluency



**Ruth Brackney**  
Kansas City  
913.451.5104 | [Email](#) | [Bio](#)  
State Bar Admission(s): KS, MO

- Family office representation
- Complex estate planning
- Trust administration



**Darin Donovan**  
Redwood Shores  
650.804.7602 | [Email](#) | [Bio](#)  
State Bar Admission(s): CA

- Basic and advanced estate planning
- Gift planning including carried interest
- Charitable planning



**Suzanne Farley**  
Redwood Shores  
650.804.7620 | [Email](#) | [Bio](#)  
State Bar Admission(s): CA

- Complex estate planning
- Complex trust and estate administration
- Federal estate tax returns and audits



**Erika Gasaway**  
San Jose  
408.299.1370 | [Email](#) | [Bio](#)  
State Bar Admission(s): CA

- Trust and estate litigation
- Real estate litigation

**Gretchen Gold**

Kansas City  
816.460.5410 | [Email](#) | [Bio](#)  
State Bar Admission(s): CO, KS,  
MO, OK

- Closely held business planning
- Trust and estate administration
- Trust and estate litigation

**John Golden**

Redwood Shores  
650.804.7605 | [Email](#) | [Bio](#)  
State Bar Admission(s): CA

- Basic and advanced estate planning
- Complex trust and estate administration
- Trust and estate litigation

**Sally Grossman**

Minneapolis  
612.632.3007 | [Email](#) | [Bio](#)  
State Bar Admission(s): MN

- Closely held business planning
- Trust and estate administration

**Joe Growney**

Kansas City  
913.451.5105 | [Email](#) | [Bio](#)  
State Bar Admission(s): KS, MO

- Multi-generational estate planning
- Fiduciary representation, including succession issues
- Trust and estate administration

**Phil Johnson**

Kansas City  
816.460.5854 | [Email](#) | [Bio](#)  
State Bar Admission(s): KS, MO

- Administration and analysis of family partnerships and LLCs
- Closely held business owner succession planning
- Federal estate and gift tax returns and audits

**James Lamm**

Minneapolis  
612.632.3404 | [Email](#) | [Bio](#)  
State Bar Admission(s): MN, ND,  
SD

- Closely held business owner succession planning
- Complex estate planning, including analytical analysis of options
- Digital assets
- Federal and Minnesota estate tax returns and audits

**Laurie-Ann Look**

Redwood Shores  
650.804.7603 | [Email](#) | [Bio](#)  
State Bar Admission(s): CA, HI

- Complex estate planning for VCs and CEOs
- Advanced gift planning
- Complex trust administration



**Scott Malin**

St. Louis  
314.613.2807 | [Email](#) | [Bio](#)  
State Bar Admission(s): CO, IL, MO

- High-net-worth estate planning
- Complex trust and estate administration
- Closely held business succession planning



**Beth Morrison**

Minneapolis  
612.632.3322 | [Email](#) | [Bio](#)  
State Bar Admission(s): MN, ND

- Supplement needs trust planning
- Guardianship and conservatorship commencement and administration
- Estate planning
- Trust and estate administration, including related tax planning



**Sheryl Morrison**

Minneapolis  
612.632.3376 | [Email](#) | [Bio](#)  
State Bar Admission(s): MN

- Charitable planning
- Administration and modification of charitable split interest trusts and private foundations
- Estate planning and administration



**Charles Packer**

San Jose  
650.804.7612 | [Email](#) | [Bio](#)  
State Bar Admission(s): CA

- Complex estate planning for high-net-worth clients and multigenerational families
- Complex trust administration and audits
- Charitable gift planning



**Marya Robben**

Minneapolis  
Practice Group Leader  
612.632.3010 | [Email](#) | [Bio](#)  
State Bar Admission(s): MN, ND

- High-net-worth estate planning, including creation and administration of complex trusts
- Trust and estate administration
- Contested trusts and estates
- Federal and Minnesota estate tax returns



**Tom Rodriguez**

Denver  
720.931.3231 | [Email](#) | [Bio](#)  
State Bar Admission(s): CO

- Trust and estate litigation
- Guardianship and conservatorship litigation



**Matthew Rossiter**

St. Louis  
314.613.2541 | [Email](#) | [Bio](#)  
State Bar Admission(s): IL, MO

- Trust and estate litigation
- Complex trust and estate administration
- Civil and fiduciary litigation



**Matthew Shea**  
Minneapolis  
612.632.3428 | [Email](#) | [Bio](#)  
State Bar Admission(s): MN, ND

- Closely held business owner succession planning
- Private equity related planning
- Complex trust administration
- Federal and Minnesota estate tax returns and audits



**James Thomson**  
Minneapolis  
612.632.3251 | [Email](#) | [Bio](#)  
State Bar Admission(s): MN

- Dynasty trust planning, especially South Dakota
- Trust decanting and modifications, including situs changes
- High-net-worth estate planning
- Trust and estate administration



**Edward Tully**  
Minneapolis  
612.632.3445 | [Email](#) | [Bio](#)  
State Bar Admission(s): KS, MN, MO, SD

- Closely held business owner succession planning
- Private equity related planning
- Complex trust administration
- Federal and Minnesota estate tax returns and audits



**Justin Whitney**  
Kansas City  
913.451.5183 | [Email](#) | [Bio](#)  
State Bar Admission(s): KS, MO

- Estate planning
- Trust and estate administration
- Closely held business owner succession planning
- Contested trust and estate administration



**Alison Zinn**  
Denver  
720.931.3255 | [Email](#) | [Bio](#)  
State Bar Admission(s): CO

- Trust and estate litigation
- Guardianship and conservatorship litigation

## Counsel

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**Vern Adkins**  
Redwood Shores / Remote  
650.804.7661 | [Email](#) | [Bio](#)  
State Bar Admission(s): CA

- Complex estate planning, including development of financial spreadsheets and tax calculations
- Complex trust and estate administration



**Casey Breese**

Denver

720.931.3230 | [Email](#) | [Bio](#)

State Bar Admission(s): CO, MO, WY

- Trust and estate litigation
- Guardianship and conservatorship litigation, including commencement cases and breaches of fiduciary duty cases

**Clare Capaccioli Velasquez**

San Jose

408.299.1306 | [Email](#) | [Bio](#)

State Bar Admission(s): CA

- Trust and estate litigation
- Trust and probate disputes including financial elder abuse, breach of fiduciary duties, and trust asset recovery
- Advises on reformation, construction and modification matters
- Complex litigation matters, including business and real estate disputes, mass tort claims and consumer rights cases

**Jill Ernst**

Redwood Shores

650.804.7644 | [Email](#) | [Bio](#)

State Bar Admission(s): CA

- Advanced estate planning
- Complex trust administrations

**Sara Hire**

San Jose

408.299.1376 | [Email](#) | [Bio](#)

State Bar Admission(s): CA

- Basic and advanced estate planning
- Trust and estate administration
- Gift planning

**Peter LeBlanc**

St. Louis

314.613.2513 | [Email](#) | [Bio](#)

State Bar Admission(s): IL, MO

- Estate planning
- Trust and estate administration, including related tax planning

**Shinny Liu**

San Jose

408.299.1412 | [Email](#) | [Bio](#)

State Bar Admission(s): CA

- Basic and advanced estate planning
- Basic and complex trust and estate administration
- Business formation and family organization (real estate holdings and other family businesses)
- Gift planning

**Joanne Lue**

Redwood Shores

650.804.7669 | [Email](#) | [Bio](#)

State Bar Admission(s): CA

- Estate and gift planning
- Trust and estate administrations including taxable estates
- Complicated client support, Mandarin fluency



**Jennifer Mispagel**

San Jose  
408.299.1339 | [Email](#) | [Bio](#)  
State Bar Admission(s): CA

- Complex estate planning
- Complex trust and estate administration
- Gift and tax planning, including entity formations
- Family law background



**Maxwell Murtaugh**

St. Louis  
314.613.2540 | [Email](#) | [Bio](#)  
State Bar Admission(s): IL, MO

- Trust and estate litigation
- Appellate practice
- Complex guardianship disputes



**Christi Pribula**

Kansas City  
816.460.5775 | [Email](#) | [Bio](#)  
State Bar Admission(s): KS, MO

- Basic and advanced estate planning
- Trust and estate administration
- Trust modifications



**Angel Saunders**

Redwood Shores  
650.804.7655 | [Email](#) | [Bio](#)  
State Bar Admission(s): CA

- Estate planning for high-net-worth families
- Trust and estate administration
- Gift planning



**Richard Schachtli**

Redwood Shores  
650.804.7606 | [Email](#) | [Bio](#)  
State Bar Admission(s): CA

- Complex and advanced estate planning and trust administration
- Charitable planning
- Entity formation and planning



**Mary Shafer**

Kansas City  
816.460.5415 | [Email](#) | [Bio](#)  
State Bar Admission(s): KS, MO

- Review of federal estate and gift tax returns

## Associates

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**Andrew Biddison**  
Minneapolis  
612.632.3482 | [Email](#) | [Bio](#)  
State Bar Admission(s): MN

- Preparation of estate planning documents
- Preparation of court petitions and draft orders for uncontested matters
- Client relationship support, including communication with clients and outside advisor teams



**Amy Crea**  
Minneapolis  
612.632.3285 | [Email](#) | [Bio](#)  
State Bar Admission(s): MN

- Preparation of estate planning documents
- Client relationship support



**Justin Hilton**  
St. Louis  
314.613.2522 | [Email](#) | [Bio](#)  
State Bar Admission(s): IL, MO

- Estate planning
- Closely held business succession planning



**Amanda Kruse**  
Minneapolis  
612.632.3479 | [Email](#) | [Bio](#)  
State Bar Admission(s): MN

- Estate planning
- Trust and estate administration
- Assist with preparation of court documents for contested and uncontested matters
- Client relationship support



**Kevin Mason**  
Kansas City  
816.460.5842 | [Email](#) | [Bio](#)  
State Bar Admission(s): KS, MO

- Estate planning
- Trust and estate administration
- Assist with preparation of court documents

## Senior Counsel

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**James Betterman**  
Kansas City  
913.451.5102 | [Email](#) | [Bio](#)  
State Bar Admission(s): KS, MO

- Fiduciary counseling and representation
- Trust and estate administration





**Peter Brown**  
Kansas City / Overland Park  
913.451.5165 | [Email](#) | [Bio](#)  
State Bar Admission(s): KS, MO

- Family office representation and servicing
- Fiduciary counseling and representation
- Closely held business succession planning



**Ann Burns**  
Minneapolis  
612.632.3402 | [Email](#) | [Bio](#)  
State Bar Admission(s): MN, WI

- Complex estate planning
- Complex trust administration
- Estate tax audits



**Julie Frommelt**  
Minneapolis  
612.632.3068 | [Email](#) | [Bio](#)  
State Bar Admission(s): MN

- Minnesota estate planning
- Nonprofit entity administration



**Ellen McKissock**  
San Jose  
408.299.1324 | [Email](#) | [Bio](#)  
State Bar Admission(s): CA

- Financial elder abuse
- Breach of fiduciary by trustees and fiduciaries
- Marrying into elder abuse and if a marriage can be challenged or terminated
- Accounting disputes
- Trust challenges or defense of those challenges

## Paralegals

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**Morgan Alexander**  
Redwood Shores  
650.804.7622 | [Email](#) | [Bio](#)

- Basic and complex trust administration
- Federal estate tax returns



**Jessica Borland**  
San Jose  
408.299.1356 | [Email](#) | [Bio](#)

- Basic and complex trust administration
- Federal estate tax returns
- Trust accountings



**Michael Custer**

San Jose

408.299.1380 | [Email](#) | [Bio](#)

- Complex trust and estate administration
- Trust accountings
- Federal estate and gift tax returns



**Lynn Dowsing-Connolly**

San Jose

408.299.1305 | [Email](#) | [Bio](#)

- Federal estate and gift tax returns
- Basic and advanced estate planning
- Entity work, including CTA support and analysis



**Jacqueline Fritze**

San Jose

408.299.1416 | [Email](#) | [Bio](#)

- Basic and advanced estate planning
- Basic and complex trust and estate administration
- Federal estate and gift tax returns
- Entity work, including CTA support and analysis



**Kimberly Goheen**

Redwood Shores

650.804.7641 | [Email](#) | [Bio](#)

- Large and complex trust administration
- Federal estate tax returns
- Client relationship management and support



**Lisa Loree**

Kansas City

816.460.5651 | [Email](#) | [Bio](#)

- Federal estate and gift tax returns
- Trust and estate administration



**Christopher McGreevy**

Minneapolis

612.632.3396 | [Email](#) | [Bio](#)

- Federal estate and gift tax returns
- Trust and estate administration



**Tiffany Meyer**

Kansas City

913.451.5182 | [Email](#) | [Bio](#)

- Trust administration
- Trust accountings



**John Penberthy**

St. Louis

314.613.2812 | [Email](#) | [Bio](#)

- Trust and estate administration
- Federal estate and gift tax returns



**Cindy Peterson**

Kansas City

816.460.5766 | [Email](#) | [Bio](#)

- Closely held business formation and administration
- Estate administration



**Brandi Pruett**

Denver

720.931.3246 | [Email](#) | [Bio](#)

- Trust and estate litigation
- Guardianship and conservatorship commencement and administration
- Trust accountings



**Jaime Quteish**

San Jose

408.299.1357 | [Email](#) | [Bio](#)

- Basic and complex estate plan drafting
- Entity work, including CTA support and analysis



**Cheyenne Serrano**

Denver

720.931.3141 | [Email](#) | [Bio](#)

- Trust and estate litigation
- Guardianship and conservatorship commencement and administration



**Sandy Stander**

Kansas City

913.451.5140 | [Email](#) | [Bio](#)

- Trust and estate administrations, including accountings
- Federal estate and gift tax returns