Lathrop GPM

KANSAS CITY

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Kansas City, MO 64108

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Assistant

Tina Hecke
816.460.5849

PRACTICE AREAS

Closely Held & Family Business

Trusts, Estates & Legacy Planning

Trust & Estate Litigation

COURT MEMBERSHIPS

- Kansas
- Missouri

EDUCATION

Cornell University Law School, J.D., 1999

University of Missouri-Columbia, B.A., 1994

LANGUAGES

Spanish

Phillip K. Johnson

Partner | phil.johnson@lathropgpm.com

Phillip Johnson concentrates his practice on trust, estate, tax and general business law. His practice involves:

- Preparation of basic estate planning instruments including wills, revocable trusts, durable powers of attorney for financial matters, durable powers of attorney for health care and living wills.
- Estate tax planning for use of the marital deduction and estate tax exemption.
- Sophisticated estate planning for high net worth individuals including structure and documentation of family limited partnerships, discount planning, gifting programs, generation-skipping tax planning, private annuities, installment sales, grantor retained annuity trusts, qualified personal residence trusts and grantor trusts.
- Succession planning for owners of closely-held businesses including structure and documentation for corporate reorganizations, recapitalizations, voting trusts, stock sales, asset sales and non-qualified deferred compensation plans.
- Life insurance planning including preparation of irrevocable life insurance trusts.
- Charitable planning and formation of charitable entities, including structure and documentation of charitable remainder trusts, charitable lead trusts, supporting organizations, private foundations, tax-exempt organizations and public charities.
- Estate planning with retirement assets including planning for minimum required distributions, generation-skipping tax planning and conduit trusts, spousal rollovers, inherited IRAs, preparation of beneficiary designations and structuring charitable gifts.
- Trust and estate administration and litigation, including trust terminations and modifications, will and trust contests, claims against trusts and estates, charitable gift reformation,

guardianships and conservatorships.

- Preparation of estate tax returns, gift tax returns and income tax returns for trusts and estates.
- Resolution of tax controversies with the Internal Revenue Service and Missouri and Kansas taxing authorities.
- Negotiation and preparation of premarital agreements and related instruments.
- Formation of basic C corporations, S corporations, limited liability companies, limited partnerships and partnerships.
- Perfection of security interests through security agreements and uniform commercial code filings.

Events

- Legacy and Tax Planning Opportunities in a Pandemic
  April 16, 2020
- Estate Planning in 2018 - Overland Park
  November 6, 2018
- Estate Planning in 2018 - Kansas City
  October 11, 2018

Presentations

- Panelist, "Key Points to Consider When Selling Your Business," U.S. Bank Private Wealth Management, March 28, 2023

Client Alerts And Blog Posts

- Legacy & Tax Planning in a Pandemic
  April 27, 2020

News Releases

- Lathrop Gage Promotes Six Attorneys to Partner Status
  January 5, 2009

Professional Affiliations

- The Missouri Bar
- American Bar Association