



KANSAS CITY

2345 Grand Blvd. Suite 2200 Kansas City, MO 64108

T: 816.460.5854 F: 816.292.2001

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, generationskipping 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