

**KANSAS CITY**

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Claudia Mann  
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**PRACTICE AREAS**

Wealth Strategies

**INDUSTRIES**

Charitable and Other Exempt  
Organizations

Healthcare

**EDUCATION**

University of Missouri-Kansas  
City School of Law, LL.M.  
Taxation, 1968

Yale Law School, LL.B., 1965

University of Notre Dame, M.A.,  
1962

University of Notre Dame, B.A.,  
1961

**Maurice J. O'Sullivan, Jr.**

Of Counsel | [mosullivan@lathropgage.com](mailto:mosullivan@lathropgage.com)

In addition to his extensive trust and estate planning practice, Mr. O'Sullivan has significant experience in non-qualified deferred compensation, qualified retirement and welfare benefit plans for a wide variety of employers, including publicly and privately held companies, hospitals, tax exempt trade associations, churches and governmental entities. This experience includes the design, planning and execution of deferred compensation plans for executives (and the special problems posed by Section 457 of the Internal Revenue Code), qualified defined benefit and defined contribution plans, especially ESOPs and tax sheltered annuity programs.

Maurice also provides legal and tax advice in the planning and implementation of both current and deferred giving programs for charitable organizations, including charitable remainder and annuity trusts, gifts of stock of closely-held corporations and of life insurance. He has structured and established tax exempt charitable foundations including private foundations, as well as more specialized entities such as self-funded malpractice trusts for hospitals.

Adjunct Professor, University of Missouri-Kansas City School of Law, 1968-92.

**Court Memberships**

- Missouri
- U.S. Court of Appeals for the Eighth Circuit
- U.S. Court of Appeals for the Tenth Circuit
- U.S. Supreme Court

- U.S. Tax Court

## Honors

- Named "Kansas City, Mo. Employee Benefits (ERISA) Law Lawyer of the Year" by *Best Lawyers*, 2012
- Selected for Missouri/Kansas *Super Lawyers*, 2006-2009, 2011 and 2012
- Selected by peers for past 30 years, *The Best Lawyers in America*®
- Named to Best of the United States, Lawyer Section 2006
- Selected for Best Attorneys Network Directory, 2005
- Selected by peers for "Best of the Bar," *The Kansas City Business Journal*, 2003-2004
- Fellow, American College of Trust and Estate Counsel
- Martindale-Hubbell® "AV" Rating
- Law Foundation 1986 Service Award; 1993 Outstanding Service Award

## Professional Affiliations

- American Bar Association, Taxation, Probate and Trust Law Sections
- The Missouri Bar
- Kansas City Metropolitan Bar Association
- Estate Planning Society of Kansas City, Past Director

## Publications

- Articles published in "Estates, Gifts and Trusts Journal; Estate Planning; Trusts & Estates; Journal of The Missouri Bar; Journal of the Kansas Bar Association."
- Co-author: "Missouri Estate Planning," published by The Missouri Bar, 1986; 1988; 1992; 1999; 2001 Editions
- Co-author: "Missouri Estate Administration," published by The Missouri Bar, 1984; 1986; 1989 and 1992 Editions
- Co-author: "Estate and Gift Tax After ERTA," published by the Practicing Law Institute, 1982
- Co-author: "Practical Will Drafting," seven handbooks published by the Practicing Law Institute, 1973-79
- Co-author: "Eleventh Hour Tax Legislation," published by the Practicing Law Institute, 1977

- Co-author: "Estate and Gift Tax After Tax Reform," published by the Practising Law Institute, 1977

## Presentations

- Presenter, "Charitable Tax Planning," 35th Annual Recent Developments in Federal Taxes Seminar, co-sponsored by the Foundation of the Lawyers Association of Kansas City and the University of Missouri-Kansas City School of Law/Continuing Legal Education, February 2, 2013
- Presenter, "Charitable Tax Planning," 34rd Annual Recent Developments in Federal Taxes Seminar, co-sponsored by the Foundation of the Lawyers Association of Kansas City and the University of Missouri-Kansas City School of Law/Continuing Legal Education, January 28, 2012
- Presenter, "Charitable Tax Planning Update — 2010 Developments," 33rd Annual Recent Developments in Federal Taxes Program, UMKC School of Law, January 29, 2011
- Presenter, "Charitable Tax Planning Update — 2009 Developments," 32nd Annual Recent Developments in Federal Taxes Program, UMKC School of Law, January 23, 2010
- Presenter, "Charitable Tax Planning," Recent Developments in Federal Taxes, January 24, 2009
- Presenter, "Update on Charitable Planning," 11th Annual Estate Planning Internship Program, September 30, 2004