Sheryl G. Morrison

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PRACTICE AREAS

Trust & Estate Litigation

Closely Held & Family Business

Nonprofit & Tax-Exempt Organizations

Charitable Gift Planning

Trusts, Estates & Legacy Planning

INDUSTRIES

Education

Health Care

COURT MEMBERSHIPS

- Minnesota

EDUCATION

University of Minnesota Law School, J.D., *cum laude*, 1988

"I am committed to helping my clients understand the complex tax and legal concepts that affect their planning, and I am passionate about my clients feeling that they have received valuable solutions that they can appreciate," said Sheryl Morrison.

Sheryl Morrison, a partner in Lathrop GPM's Trust, Estates & Legacy Planning group, has a long and distinguished track record of helping clients plan for the future of their family and their financial and philanthropic legacies. Individual clients rely on Sheryl's 35-plus years of experience in guiding them in estate and wealth planning for the benefit of themselves and their future generations. Sheryl also works with nonprofits of all kinds and sizes nationally in guiding them through charitable giving and gift management challenges.

Working Closely with Individual Clients

"For my individual clients, I help them identify their objectives and then I counsel them to understanding the solutions and strategies to meet those objectives," she said.

Sheryl helps clients implement detailed estate and wealth planning which includes everything from transfer tax strategies and business succession planning to complex estate and trust management. As a result, she helps clients achieve their goals of managing, protecting and preserving their wealth through strategies that minimize taxes and promote effective management of assets.

High-net-worth individuals stand to gain significantly from engaging with an experienced trust, estate, and legacy planning lawyer. Sheryl

- ABA Moot Court, Director, 1987-1988,
- Phi Kappa Phi

University of Minnesota, B.A., English Literature and Philosophy, *magna cum laude*, 1985

- Martin B. Ruud Scholarship

possesses in-depth knowledge of the latest legal strategies and tax-saving techniques, essential for efficient wealth preservation and succession planning. She crafts customized solutions that ensure clients' assets are protected and smoothly transferred to the next generation and to their chosen philanthropic endeavors, often navigating complex regulatory landscapes to minimize tax liabilities. Clients often convey that they gain peace of mind from this planning that assures their legacy is structured to reflect their wishes and benefit their family and chosen charities.

Sheryl's insightful contributions have earned her the respect of her peers and community, making her a sought-after speaker and mentor among fellow lawyers and the greater community who are eager to learn from her knowledge and experience in the field.

Guiding Nonprofit Entities

Another major focus of Sheryl's practice is serving nonprofits. She helps organizations understand how they can boost development efforts through planned and complex gifts, as well as to implement practices that serve and protect their organizations governance and development. Higher education institutions, healthcare organizations and other charities have relied on Sheryl's guidance to implement their charitable gift acquisition programs and administration practices. Sheryl speaks frequently at local and national associations and organizations on the topic of charitable giving to audiences of other professionals seeking to learn more about planned giving and charitable gifts.

Some of the key areas Sheryl advises nonprofit clients on include:

- Endowment giving and management
- Gifts, including complex and unique gifts, restricted gifts, gift instruments and gift acceptance policies
- Estate and trust administration
- Fund management and court modification actions

WHEN ASKED ...

What do you do outside of work?

I am involved in the Minnesota Gift Planning Association as a past-board member and Chair of their sponsorship community. I'm an avid gardener and I create and manage a large community garden plot each year that provides produce for family, friends and our local food shelf. I occasionally golf with a local women's golf league where I serve on the board and help manage their annual charity tournament.

REPRESENTATIVE EXPERIENCE

- Assisted a nonprofit client in reforming the terms of a restricted gift where the terms of the gift had become unworkable due to changes in the nonprofit's operations and missions.
- Helped a nonprofit client in implementing various governance and operational documents to better manage their organization.
- Worked with a high-net-worth client in tax planning for gifts to the spouse and family members to best use their state and federal tax exemptions by implementing complex marital and children's trust structures.
- Assisted a client with a tax effective charitable gift giving strategy of some of his company interests prior to selling his business to reduce capitals gains and provide a significant fund for charity. Later, the client also set up a charitable lead trust to provide for charity as well as family in a way that minimized gift and estate taxes.

Events

- Accepting and Managing Restricted Gifts in Challenging Times
  April 21, 2022
- Legacy and Tax Planning Opportunities in a Pandemic
  April 16, 2020
- Who Gets the Cookies? Recent Developments in Nonprofit Management of Gifts for Your Mission
  November 13, 2019
- Give It Up but Don’t Tie It Up: Considerations for Restricted Gifts
  April 17, 2019

- The Three C’s in Dealing with the IRS and Other Regulators—Compliance, Compliance, Compliance!
  July 26, 2018
- Navigating the New Tax Law Changes in the Nonprofit World
  April 24, 2018
- The New Tax Plan and What It Means for You
  March 14, 2018
- Charitable Development Team Breakfast Briefing: All in the Family: How to Evaluate and Accept Gifts of Closely Held Business Interests
  September 12, 2017
- Charitable Development Team Breakfast Briefing: Planned Giving 101
  April 20, 2017
- Charitable Development Breakfast Briefing: Back to School - Dos and Don'ts With Endowed Scholarship Gifts
  September 13, 2016
- Getting Your Planned Gift Initiatives Off the Ground
  April 28, 2016
- Disputed Gifts and the Three Fs: Fiduciaries, Family, and Philanthropists
  October 6, 2015
- “The Good, the Bad and the Ugly: Degrees of Donor Involvement,” CDT Breakfast Briefing
  May 12, 2015
- Fundraising Fitness: Is Your Development Program in Shape?
  September 11, 2014
- “Family Cabin,” GPM seminar
  August/September 2014
- “The Glass Slipper: When is a Planned Gift the Right Gift?” co-presenter, GPM Charitable Gift Planning Breakfast Briefing
  February 18, 2014
- “The King Lear Syndrome: How to Avoid Disputes about Restricted Gifts,” co-presenter, GPM Charitable Gift Planning Breakfast Briefing
  October 29, 2013
- The New Normal? Gift Planning in an Age of “Permanence”
  March 12, 2013
- You Want to Give Us What? Opportunities for Gifts of Unusual Assets

October 2, 2012

- All In The Family: How To Evaluate And Accept Gifts Of Closely Held Business Interests
  February 21, 2012
- Modern Alchemy: Converting Planned Gifts To Current Dollars
  October 11, 2011
- Smoke, Mirrors, And Money: What Does The 2010 Tax Act Really Mean For Charitable Gift Planning?
  February 15, 2011
- Implications of Estate and Income Tax Changes to End-of-Year Estate Planning Breakfast Briefing
  December 9, 2010
- “Flying On Instruments: Gift Planning in the Face of Estate Tax Uncertainty, a Weak Economy, and Just About Everything Else,” GPM Charitable Gift Planning Breakfast Briefing
  July 21, 2010
- “We're Not in Kansas Anymore: Handling Restricted Gifts, Charitable Trusts, and Estate Workouts in an Increasingly Litigious Environment,” GPM Charitable Gift Planning Breakfast Briefing
  March 3, 2010
- “Cows, Corn, and Cellos: Underused Assets in Planned Giving,” GPM Higher Education Breakfast Briefing
  April 14, 2009
- “When Economic Times are Bad, Estate Planning is Good: Planning in Low Interest Rate Markets,” GPM Estate Planning Seminar
  May 2008
- “Tax Tips and Topics: Year-End Update for 2007 and 2008,” GPM Estate Planning Seminar
  October 2007

Presentations

- Presenter, "Recent Developments in Charitable Giving & Year End Giving," CommunityGiving webinar, November 29, 2023
- Presenter, "What's Trust Got To Do With It? A Survey of Charitable Trusts Used in Estate Planning," 60th Annual Heart of America Tax Institute, November 3, 2023
- Co-presenter, "All Tied Up and Nowhere to Go? Managing Restricted Gifts to Your Benefit," Minnesota Gift Planning Association Annual Conference, October 4, 2023

- Speaker, "What's New? Top Recent Developments in Charitable Giving," Minnesota Gift Planning Association Webinar, September 14, 2023
- Presenter, "Charitable Matchmaking," Red River Valley Estate Planning Council, March 23, 2023
- Presenter, "You Want to Give us What? How to Accept Unique Gifts," Minnesota Gift Planning Association Annual Conference, November 3, 2022
- Co-Presenter, "Stump the Experts: Lathrop GPM Panel Fields Your Questions," Minnesota Gift Planning Association Annual Conference, November 2, 2022
- Speaker, "What's News: Exploring Gifts of Unique Assets and Other Charitable Giving Strategies in Today's Environment," Eau Claire Community Foundation 17th Annual Professional Advisor Event, October 20, 2022
- Panelist, "2022 Large Estates Panel," 2022 Probate & Trust Law Section Conference, June 14, 2022
- Presenter, "Planned Gift Strategies and Donor Stories," Way to Grow Executive Leadership Zoom Webinar, May 24, 2022
- Co-Presenter, "Playing Your Hand: Managing Restricted and Complex Gifts and Funds," Minnesota Council on Nonprofits Finance and Sustainability Conference, March 31, 2022
- Presentation, "A Gift for All Seasons: Matching Planned Gifts to Donor Objectives," Minnesota Gift Planning Association (MGPA) - 45th Annual Conference, October 28, 2021
- Presenter, "Qualified Plans and Testamentary Planned Gifts," CommunityGiving, June 24, 2021
- Podcast Guest, "Taking the Mystery (And Some of the Pain) Out of Working with Legal Counsel," A Legacy of Generosity - Leave a Legacy Minnesota, June 22, 2021
- Presenter, "Philanthropic Matchmaking: Applying the Best Strategies for Your Charitable Client," Minnesota State Bar Association's 2021 Probate & Trust Law Section Conference, June 7, 2021
- Presenter, "Understanding Charitable Giving Strategies in an Era of New Tax Rules," LeadingAge Minnesota 2020 Institute and Expo, February 5, 2020
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Co-Presenter, "Planning Your Legacy: Coordinating Business Succession and Charitable Planning," St. Paul and Minnesota Community Foundations, November 1, 2018

- Presenter, "Advanced Advancement Issues: Advising Institutions on Current Issues in the Gifting and Investment Ecosystem," NACUA Annual Conference, June 24, 2018
- Presenter, "IRA Trust Charitable Distributions: Uses, Tax Implications, How-to's," National Business Institute March 2, 2018
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Presenter, "A Gift for All Seasons: Matching Planned Giving Alternatives to Donor Objectives," Minnesota Planned Giving Council Annual Conference, November 15, 2017

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Co-presenter, "Unlocking the Power of Your Clients' Philanthropy," Financial Planning Association of Minnesota, September 19, 2017

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Co-presenter, "Charitable Giving Alternatives: Donor Advised Funds, Comparing Private Foundations and Charitable Trusts," 43rd Annual Probate & Trust Law Section Conference, Minnesota State Bar Association, June 12, 2017

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Presenter, "Launching Your Planned Giving Program: Policies and Procedures for a Safe Launch," Minnesota State Colleges and Universities, June 7, 2017

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Presenter, "A Gift for All Seasons: Matching Planned Giving Alternatives to Donor Objectives", Minneapolis Chapter of Financial Services Professionals, May 4, 2017

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Presenter, "Estate Planning," Lakewood Cemetery Association, April 29, 2017

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Presenter, "On the Menu - Charitable Alphabet Soup: Developing a Discerning Palate for CGAs, CRTs and CLTs," Mid-Iowa Planning Giving Council, February 28, 2017

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Presenter, "Donor Advised Funds vs. Private Foundations: Advising Your Clients and Donors," Red River Valley Estate Planning Council, January 11, 2017

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Presenter, "Corn, Cellos and Crude: Charitable Gifts of Unusual Assets," Minnesota Planned Giving Council Annual Conference, November 17, 2016

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Presenter, "Charitable Components of Estate Planning," 42nd Annual Probate and Trust Section Conference, Minnesota Bar Association, June 6, 2016

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Presenter, "Estate and Charitable Planning for Women," Health Partners/Regions Foundation Internal Seminar, April 19, 2016

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Co-presenter, "Corn, Cellos, and Crude: Charitable Gifts of Unusual Assets," American Council on Gift Annuities, April 7, 2016

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Presenter, "Estate and Legacy Planning Seminar," Minnesota Valley Universalist Church, February 21, 2016

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Co-presenter, "Stump the Experts," Minnesota Planned Giving Conference, November 18, 2015

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Presenter, "Charitable Remainder Trusts," National Business Institute, webcast presentation, May 21, 2015

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Presenter, "Did You Know? Types of Gifts and Tax Benefits," The Salvation Army, February 20, 2015

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Presenter, "Legal and Tax Developments Affecting Charitable Giving," Plymouth Congregational Church," February 1, 2015

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Co-presenter, "Ambidextrous Gift Policies: Getting the Right and Left Hands to Work Together," 2014 Minnesota Planned Giving Conference, Minnesota Planned Giving Council, November 4, 2014

- Presenter, "Estate Planning 101," Girls Scouts River Valley Lakamaga Conference, August 16, 2014
- Presenter, "Minnesota's Estate and Gift Tax - A Season of Change," Minnesota Orchestra Estate Seminar, July 10, 2014
- Co-Presenter, "Tea? With or Without Sugar? Federal and State Legal and Tax Developments," Minnesota Planned Giving Council Breakfast Meeting and Education Program, January 14, 2014
- Co-presenter, "What's Up Doc? A Diagnosis of Recent Federal and State Legal and Tax Developments," 37th Annual Minnesota Planned Giving Conference, Minnesota Planned Giving Council, September 26, 2013
- Co-presenter, "A Gift for All Donors: Advising Philanthropic Clients About Charitable Giving Strategies," 39th Annual Probate & Trust Law Section Conference, Minnesota State Bar Association, June 10-11, 2013
- Presenter, "Planned Gifts in an Uncertain Economy," MPGC January Program, Breakfast Panel Discussion Minnesota Planned Giving Council, January 8, 2013
- Co-presenter, "THE GLASS SLIPPER: When is a Planned Gift the Right Gift?," 36th Annual Minnesota Planned Giving Conference, Minnesota Planned Giving Council, November 8, 2012
- Co-presenter, "Having Your Cake and ... What Are Life Income Gifts and What Makes Them Attractive?," 36th Annual Minnesota Planned Giving Conference, Minnesota Planned Giving Council, November 8, 2012
- Presenter, "What I Wish I Knew: "Must Know" Charitable Concepts for Attorneys and Other Advisors," 38th Annual Probate & Trust Law Section Conference, Minnesota State Bar Association, June 2012

- Presenter, "A Match Made in Heaven: Gifts That Will Make Your Donor Fall Hook, Line, and Sinker," Association of Lutheran Development Executives Conference, February 7, 2012
- Presenter, "Moving Forward - What's Working in Gift Planning and With Allied Professionals," Association of Lutheran Development Executives Conference, February 6, 2012
- Presenter, "Something Old, Something New, Something Borrowed...A Legal and Legislative Update During the Debt Crisis and Other Man-Made Disasters," 35th Annual Minnesota Planned Giving Conference, November 1-2, 2011
- Presenter, "Beyond the Annual Campaign: Successful Development of More Donors and More Gifts," Minneapolis Jewish Federation, September 27, 2011
- Presenter, "The Hurt Locker: Defusing the Retirement Account Bomb with a Charitable Gift" and "Who's Your Daddy? Perspectives on Conception and the Law," 37th Annual Probate & Trust Law Section Conference, Minnesota State Bar Association, June 2011
- Presenter, "Smoke, Mirrors, and Money: What Does the 2010 Tax Act Really Mean for Charitable Gift Planning?" Minnesota Giving Council Education Session, May 10, 2011
- Presenter, "2011 Estate Tax Law Changes," Allodium Investment Consultants, April 27, 2011
- Presenter, "What Does the 2010 Tax Act Really Mean for Charitable Gift Planning?," The Minneapolis Foundation, February 23, 2011
- Presenter, "Charitable Gifts and Estate Planning in Light of 2010 Tax Act," Minnesota Orchestral Association, February 17, 2011
- Presenter, "Retirement Plans in Charitable Planning" and "We're Not in Kansas Anymore: The Changing Relationship Between Donors and Charities," 34th Annual Minnesota Planned Giving Conference, November 2-3, 2010
- Presenter, "Making Lemonade: Recipes for Charitable Planning in the Aftermath of the Great Recession," 36th Annual Probate & Trust Law Section Conference, June 8, 2010
- Presenter, "Estate and Wealth Transfer Planning in 2010 - Bringing Some Order to Chaos During a Year of Uncertainty," Financial Planning Association of Minnesota, May 18, 2010
- Presenter, "Planned Charitable Gifts that Thrive in a Recession," Association of Fundraising Professionals, November 10, 2009
- Presenter, "CLATs, CGAs and Charitable Remainders: Planned Gifts that Thrive in the Recession," 33rd Annual Minnesota

Lathrop GPM

Planned Giving Conference, November 3-4, 2009

- Presenter, "Charitable Income Tax Deduction: Advanced Issues," American Law Institute-American Bar Association "Estate Planning in Depth" Course of Study, University of Wisconsin Law School, June 2009
- Presenter, "The ABC's of Charitable Planning: A Primer on Planned Giving Techniques," 35th Annual Probate & Trust Law Section Conference, Minnesota State Bar Association, June 2009
- Presenter, "When Economic Times are Bad: Charitable Planning Opportunities in Low Interest Rate Markets, Courage Center, January 2009
- Presenter, "Navigating Uneven Waters When Considering Gifts of Special Assets," 32nd Annual Minnesota Planned Giving Conference, November 2008
- Presenter, "Sophisticated Trust Planning (including GRATs and CLATs) in a Low Interest Rate Environment," Association of Fundraising Professionals Conference, October 22, 2008
- Presenter, "Non-Grantor Charitable Lead Trusts," St. Paul Foundation and Minnesota Foundation, September 23, 2008
- Presenter, "Charitable Planning with High Value Real Property and Other Timely Topics," Minnesota Planned Giving Council Education Session, July 2008
- Presenter, "Grantor Retained Annuity Trusts (GRATs) in a Low Interest Rate Environment," ING Trust, July 2008
- Presenter, "Deductive Reasoning Under Section 2053 Proposed Regulations: Taking the Guesswork out of Deductible Claims Against the Estate?" and "7th Annual Large Estate Practitioner's Panel," 34th Annual Probate & Trust Law Section Conference, Minnesota State Bar, June 2008
- Presenter, "Probate by the Numbers," Minnesota State Bar Association, December 2007
- Presenter, "Legal Update: Charity Reforms and Other Developments," Minnesota Association of Museums, October 2007
- Presenter, "The ABC's of Charitable Giving: Making Sense of Alphabet Soup When Charitable Gifts are Involved" and "6th Annual Large Estate Practitioner's Panel," 33rd Annual Probate & Trust Law Section Conference, Minnesota State Bar Association, June 2007
- Presenter, "Probate by the Numbers," Minnesota State Bar Association, December 2006

- Presenter, "Drafting and Coordinating Retirement Plan Beneficiary Designations with Trusts" and "When Sominex® Doesn't Work, Take One of These: Estate Practitioner's Panel," 32nd Annual Probate & Trust Law Section Conference, Minnesota State Bar Association, June 2006
- Presenter, "Minnesota Trust Administration," Minnesota State Bar Association, September 2005
- Presenter, "Minnesota Trusts and Trust Alternatives" and "So What Do I Do Now: A Practitioners Panel," 31st Annual Probate & Trust Law Section Conference, Minnesota State Bar Association, June 2005
- Presenter, "Split Dollar: What's Left in 2004 and Beyond" and "So What Do I Do Now: A Practitioners Panel," 30th Annual Probate & Trust Law Section Conference, Minnesota State Bar Association, June 2004
- Presenter, "Income Taxation for Estate Planners," Minnesota State Bar Association, January 2004
- Presenter, "Everything You Wanted to Know About Your Estate Planning Practice But Were Afraid to Ask - Hot Topics in Estate and Trusts Practice," 29th Annual Probate & Trust Law Section Conference, Minnesota State Bar Association, June 2003
- Presenter, "Everything You Wanted to Know About Your Estate Planning Practice But Were Afraid to Ask," 28th Annual Probate & Trust Law Section Conference, Minnesota Bar Association, June 2002
- Presenter, "Generation Skipping Transfer Tax: New Developments and Strategies or Yes, We're Skipping, but Are We Having Any Fun?," 28th Annual Probate & Trust Law Section Conference, Minnesota State Bar Association, June 2002
- Presenter, "Handling Creditors' Claims, Death and Taxes," Minnesota State Bar Association, 2001-2002
- Presenter, "How to Draft Wills & Plan Small Estates - Bridge the Gap," Minnesota State Bar Association, 1998
- Presenter, "Federal Tax Law Developments," 23rd Annual Probate & Trust Law Section Conference, Minnesota State Bar Association, June 1997
- Presenter, "A Practical Guide to Estate Administration in Minnesota," National Business Institute, 1997
- Presenter, "Probate for Attorneys and Legal Assistants," Minnesota State Bar Association, 1995

- Presenter, "Planning Opportunities with Living Trusts in Minnesota," National Business Institute, 1992

Publications

- Author, "Reporting 2023 Charitable Contributions for Income Taxes, " *Wealth Management*, February 26, 2024
- Author, "Substantiation Is Key When Gifting Crypto To Charity," *Law360 - Expert Analysis*, April 27, 2023
- Co-Author, "Tax and Charitable Giving Update - 2021 (And Counting) Winter 2021," Minnesota Gift Planning Association, March 2021
- Author, "Message from the Masters: Our Best Donor Series That Made a Difference," Chapter 15, CreateSpace Independent Publishing Platform, March 15, 2019
- Author, "Sources of Trust Law", "Retirement Plans and Trusts," and "Charitable Trusts," Minnesota Trust Administration, 3rd ed., Minnesota State Bar Association, September 20, 2018
- Contributing Author, "Complete Estate Planning Lawyer's Quick Answer Book," Chapter 11, Charitable Planning, January 1, 2018
- Contributing Author, "Business Succession Planning Answer Book," Chapter 11, Charitable Strategies and Business Succession Planning, January 1, 2015
- Contributor, "What Does the 2010 Tax Act Really Mean for Charitable Gift Planning?" The Source (a quarterly publication of the Minnesota Planned Giving Council), April 1, 2011
- Author, "The Family Business Owner's Top 5 Business Succession Plan Considerations," Minnesota Business, September 14, 2009
- Author, "Charitable Lead Annuity Trusts Present Good Planning Opportunities In Turbulent Economic Times," The Source (a quarterly publication of the Minnesota Planned Giving Council), May 1, 2009
- Author, "Investing In The Financial Aspects of Our Lives," With Equal Right Minnesota Women Lawyers, August 10, 2005
- Author, "Don't Let Your Business Succession Plan Turn into a Series of Unfortunate Events," Women's Business Minnesota, June 1, 2005

Client Alerts And Blog Posts

- Valuable Lessons in Charitable Deductions
  April 10, 2023

- Giving Crypto? Substantiation is Key!
  February 20, 2023
- Ten Top Tips for Fiduciaries to Avoid Litigation
  September 22, 2022
- Spring 2021 Charitable Giving Update
  April 6, 2021
- Borrowing from the Future? Tapping Restricted and Endowment Funds in a Down Economy
  April 30, 2020
- Legacy & Tax Planning in a Pandemic
  April 27, 2020
- Philanthropy in the COVID-19 World: What Gives?*
  April 9, 2020
- Estate Planning Matters! Spring 2019
  May 1, 2019
- Charitable Development Alert: 2018 Charitable Giving Year-End Strategies
  December 10, 2018
- TECP Alert: 2018 Charitable Giving Year-End Strategies
  December 10, 2018
- 2017 Charitable Giving Year-End Reminders
  December 20, 2017
- Estate Planning Matters! Summer 2015
  June 19, 2015
- "Estate Planning and the Succession of Your Closely Held Company," GPM Estate Planning Matters!
  November 13, 2012
- E-Alert - Persons Behaving Badly As Fiduciaries: What Can A Charitable Beneficiary Do?
  September 6, 2012
- Estate Planning Matters! Fall/Winter 2011
  November 7, 2011
- "Charitable Gifts of Personal Residences," GPM Estate Planning Matters!
  October 11, 2011
- "IRA Charitable Rollover Extended To 2011," GPM Estate Planning Matters!
  August 17, 2011

- Estate Planning Matters! Summer 2011
  July 4, 2011

In The News

- MPR Interviews Sheryl Morrison on 2020 Tax Filing Considerations
  January 25, 2021
- "Fresh Options for Continuing Generosity," Giving (supplement to Twin Cities Business magazine)
  November 11, 2019
- "Philanthropy in a Time of Flux," Giving (supplement to Twin Cities Business magazine)
  2018
- Trust, Estate & Charitable Planning Group Presents Tax Updates
  April 6, 2018
- "Giving Outside The Box," Giving (supplement to Twin Cities Business magazine)
  May 2012
- "5 Things To Know About Charitable Trusts," MNSIGHTS
  Spring 2012
- "The Age Of Giving: Planned Giving Is Something Everyone, Even Kids, Should Consider," MPLS.ST.PAUL Magazine
  December 2011
- Bob Harding and Sheryl Morrison Present to Minnesota Planning Giving Council
  May 10, 2011
- "Coffee & Answers," Talking About Philanthropy
  February 2011
- "Giving Smarter," Twin Cities Business (Annual "Giving" Supplement)
  April 2010

News Releases

- Grossman and Morrison Named 2016 Five Star Financial Services Professionals
  September 14, 2015
- Three Gray Plant Mooty Lawyers Named Five Star Professionals in Estate Planning
  November 11, 2014

Professional Affiliations

- Minnesota Planned Giving Council, Board Member, 2010-2015 and 2017-present; Conference Planning Committee Member and Development Committee Chair, 2010-present
- Minnesota State Bar Association, Probate & Trust Law Section, Governing Council, 2012-2014; Legislation Committee, 2002-2010; Annual Probate & Trust Law Section Conference Planning Committee, 2006-present
- American Bar Association, 1988-present
- Minnesota State Bar Association, 1988-present
- Hennepin County Bar Association, 1988-present
- Minnesota Women Lawyers, 1988-present

Community Involvement

- Timber Creek Tuesday Women's Golf League, Board Member, 2018-present
- Orono Girl Scout Leader, 2007-2017
- Orono Middle School Parents Association, Board Member, 2010-2013
- Orono Thunder Soccer, Coach, 2003-2011
- Orono Alliance for Education, Treasurer, 2002-2006, Secretary, 2006-2010
- Orono Fastpitch Softball, Coach, 2005-2008
- Plymouth City Council, Member, 1994

Honors

- 2015-2016 Twin Cities Five Star Financial Services Professional
- Fellow in Charitable Estate Planning, Charitable Estate Planning Institute