



## Joseph D. Growney

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### KANSAS CITY

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### Assistant

Jana Stuart  
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### PRACTICE AREAS

Closely Held & Family Business

Trusts, Estates & Legacy  
Planning

Trust & Estate Litigation

### COURT MEMBERSHIPS

- Kansas
- Missouri

### EDUCATION

University of Missouri-Kansas  
City School of Law, J.D., *with  
distinction*, 2004

Rockhurst University, B.A.,  
Political Science & Spanish,  
*Valedictorian*, 2001

Joseph Growney concentrates his practice in all areas of estate planning, including the preparation of basic and complex estate planning documents, and the implementation of sophisticated planning techniques. He also assists high net worth individuals and closely-held businesses with business succession planning and tax planning, including the formation of corporations, partnerships and limited liability companies, and structuring of corporate reorganizations and recapitalizations.

Joseph's estate planning practice also includes life insurance planning, charitable planning and estate planning with retirement benefits.

### Events

- Truman Heartland Community Foundation's Professional Advisor Seminar Series  
May 9, 2024
- Nonprofit Conversations Seminar - Kansas City  
May 17, 2018
- Tax Reform Seminar  
March 28, 2018

### Presentations

- Co-presenter, "Estate and Charitable Gift Planning with Retirement Assets and Closely-Held Businesses," Truman Heartland Community Foundation, October 26, 2023
- Co-presenter, "Conversations About Careers in the Law," University of Missouri-Kansas City School of Law, March 1, 2023
- Co-presenter, "Charitable Gift Planning in 2021: Options and Strategies to Achieve Your Client's Giving Goals," Truman Heartland Community Foundation - Professional Advisor Seminar

Series, October 28, 2021

- Presenter, "Who Will Speak For You?" Rockhurst University - Webinar, June 10, 2021
- Presenter, "Planned Giving Options," University of Central Missouri Alumni Foundation, September 15, 2020
- Co-presenter, "Charitable Gift Planning and Navigating RMDs Under the SECURE Act," MOKAN Trust & Financial Services Conference, August 17, 2020
- Co-presenter, "Pre and Post Sale Planning for You, Your Company and Your Family," A Conference for Business Owners: M&A Solutions for Privately Held Companies, October 8, 2019
- Speaker, "Shifting the Focus to Basis Planning: Techniques and Strategies to Achieve Overall Tax Savings," MOKan ACTEC Lawyers, Kansas City, December 2018
- Panelist, "Estate Planning for Artists," International Sculpture Conference, Nelson-Atkins Museum of Art, Kansas City, October 2017
- Panelist, "Estate Planning Fundamentals 2017," University of Missouri-Kansas City School of Law, October 2017
- Speaker, "Basics of Gifting, Retirement Asset Planning," and "Federal Generation-Skipping Transfer Tax (GST)," Halfmoon Education, Inc., Overland Park, Kansas, August 2017
- Speaker, "Legacy IRA Act," Carthage Community Foundation, Carthage, Missouri, November 2016
- Speaker, "Charitable Lead Annuity Trust Planning," Mid-America Planning Giving Council, Kansas City, November 2015
- Speaker, "Asset Protection," Annual Trust & Estate Institute, The Missouri Bar, Columbia, Missouri, October 2015
- Speaker, "Representing Family Business Clients," Fundamentals of Estate Planning, University of Missouri-Kansas City School of Law, October 2015
- Speaker, "Revocable Living Trusts and Ethical Considerations," "Trusts 101," National Business Institute, Kansas City, May 2014
- Speaker, "The Laws and Rules Governing Trustees and Overcoming Ethical Challenges," Fundamentals of Trust Administration, National Business Institute, May 2012
- Speaker, "Overview of Asset Protection Strategies," Estate Planning Internship Program, University of Missouri-Kansas City School of Law, October 2011

- Speaker, "Asset Protection," BKD One Great Week, Kansas City, November 2010
- Speaker, "Practical Guide to Probate and Estate Administration," University of Missouri-Kansas City School of Law, March 2009 and September 2010

### Publications

- Co-author, "Estate Planning Considerations, in Practitioner's Guide to Kansas Family Law," Kansas Bar Association, 2013 and 2016
- Author, "Over the Horizon, Some Estate-Gift Tax Issues Loom," *Ingram's*, April 2011

### In The News

- Ingram's Magazine Features Partner Joseph Growney with Q&A on Charitable Giving  
December 2022
- Partner Joseph Growney Quoted in Investment News Cover Story  
January 25, 2021
- Ingram's Magazine Interviews Joe Growney About Charitable Giving Trends  
December 30, 2019
- Ingram's Magazine Speaks with Joe Growney on Charitable Giving Trends Since the Passage of the 2017 Tax Cuts and Jobs Act.  
December 16, 2019

### News Releases

- Lathrop Gage Promotes Seven to Partner  
January 6, 2014

### Professional Affiliations

- Mid-America Charitable Gift Planners, Board Member, 2018; Secretary, 2019-2020; President-Elect, 2021; President, 2022
- Estate Planning Society of Kansas City, Secretary, 2016-2017; Vice President, 2017-2018; President, 2018-2019
- Kansas City Estate Planning Symposium, Board Member
- The Missouri Bar, Member
- Kansas Bar Association, Member
- Kansas City Metropolitan Bar Association, Member

## Community Involvement

- Children's Mercy Hospital Donald H. Chisholm Planned Giving Council, Member

## Honors

- University of Missouri-Kansas City Law Review, Staff Member