



Beth T. Morrison

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MINNEAPOLIS

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Assistant

Lisa Peterson Hall
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PRACTICE AREAS

Trusts, Estates & Legacy
Planning

COURT MEMBERSHIPS

- Minnesota
- North Dakota

EDUCATION

University of St. Thomas, J.D.,
cum laude

- Dean's Award in Estate Planning

University of Minnesota, Twin
Cities Campus, B.A., *summa
cum laude*

Beth Morrison works with clients, individuals, and corporate trustees alike, to implement tax-efficient estate plans. Her experience includes drafting trusts, wills, real estate documents, and other estate planning tools. Beth has established guardianships for people with disabilities and developed estate plans utilizing special needs and supplemental needs trusts to fulfill clients' specific estate planning goals. In addition, she advises clients on business matters related to formations and buy-sell agreements.

Representative Experience

- Developed and implemented strategies to reduce or eliminate federal estate and gift taxes.
- Drafted trusts, wills, real estate documents and other estate planning tools.
- Represented clients throughout the probate and trust administration process.
- Advised corporate trustees in trust administration matters.
- Advised clients on business needs including LLC formations and review buy-sell agreements.
- Completed Minnesota and Federal estate tax returns.
- Established guardianships and conservatorships for people with disabilities and developed estate plans utilizing special needs and supplemental needs trusts to fulfill clients specific estate planning goals.
- Drafted estate plans for individuals and families at all levels of complexity, ranging in value from very modest to ultra-high net worth.
- Filed applications for tax exempt status of charities and foundations with the IRS and advised on other charitable planning techniques.

Events

- Wealth, Legacy and the Next Generation Webinar
May 11, 2023
- Guardianship and Less-Restrictive Alternatives
June 22, 2022

Presentations

- Presenter, "What Every Lawyer Needs to Know About Estate Planning and Probate," Minnesota CLE, 2020 and 2021
- Presenter, "Your First Irrevocable Trust," Minnesota Probate and Trust Conference, June 10, 2019
- Presenter, "Estate Planning Tools," Hallberg Engineering, January 1, 2016
- Presenter, "Estate Planning for Families with Special Needs Children," Down Syndrome Parent Support Group, January 1, 2016
- Presenter, "End of Life Workshop," Thrivent Financial, January 1, 2015

Publications

- Co-author, "Tax-free Rollovers of 529 Plan Funds to Roth IRAs Allowed Under Secure 2.0," Tri-Bar Trust & Probate Section Newsletter, April 25, 2023
- Co-author, "Undue Influence in Estate Planning: When Help Goes Too Far," Hennepin County Bar Association, April 23, 2020
- Co-author, "Overview and Sources of Minnesota Trust Law Chapter," Minnesota Trust Administration Deskbook, August 2018
- Co-author, "The Prince Estate: How Intestacy Works, How it Could Work, and How it Fails as an Estate Plan," Mitchell Hamline Law Review Volume 43 Issue 6, March 31, 2018

Client Alerts And Blog Posts

- Tax-free Rollovers of 529 Plan Funds to Roth IRAs Allowed Under Secure 2.0
March 15, 2023

News Releases

- Lathrop GPM Attorneys Named 2023 Minnesota Super Lawyers and Rising Stars
July 18, 2023

- Gray Plant Mooty Welcomes New Trust, Estate, and Charitable Planning Attorney
January 14, 2019

Professional Affiliations

- Standpoint (formerly known as Battered Women's Legal Advocacy Project), Former Board Member
- Tubman Family Alliance, Pro Bono Safety Project
- Street Law Project, Former Volunteer
- University of St. Thomas Advanced Trial Advocacy Class, Volunteer

Community Involvement

- Children's Law Center, Volunteer Attorney for children in the foster system
- Impact 100, Founding Board Member and Governance Chair, Minneapolis Chapter
- Minnesota AIDS Project Volunteer, Minnesota Legal Aid Volunteer
- Minneapolis Women's Rotary Club, President 2017-2018, Board of Directors 2014-2018
- Minneapolis Alumni Club of Pi Beta Phi, Fundraising Chair, 2014-2016
- Wills for Heroes, Volunteer

Honors

- *Thomson Reuters*, "Minnesota Rising Star," 2023
- North Star Lawyer
- Jack DeWitt Pro Bono Attorney of the Year, 2016