



KANSAS CITY

2345 Grand Blvd.
Suite 2200
Kansas City, MO 64108

T: 913.451.5183
F: 913.451.0875

OVERLAND PARK

7300 West 110th Street
Suite 150
Overland Park, KS 66210

T: 913.451.5100
F: 913.451.0875

Assistant

Jana Stuart
913.451.5194

PRACTICE AREAS

Community Banking
Entrepreneurial Services
Trusts, Estates & Legacy
Planning
Trust & Estate Litigation
Closely Held & Family Business

COURT MEMBERSHIPS

- Kansas
- Missouri

EDUCATION

University of Missouri-Kansas
City Law School, L.L.M.
Taxation, 2015

Justin W. Whitney

Partner | justin.whitney@lathropgpm.com

"I view myself as a professional who can organize complex affairs for my clients and become a turn-key resource for them on their estate planning and business affairs," said Justin. Clients have praised Justin for being "highly knowledgeable, patient and well-organized," as well as responsive, and quick to point out how they've recommended him to others.

Justin Whitney, has a strong track record of helping clients to navigate the complex world of estate, succession and tax planning, is a partner in Lathrop GPM's Trust, Estates & Legacy Planning group. Clients rely on Justin to help them prepare their estates and businesses for the future, ensuring decades of hard work are preserved and passed on to future generations. He represents high net worth individuals and closely held businesses, helping them prepare basic and complex estate planning documents, as well as business succession and tax planning.

Justin's experience and background make him a good fit for those seeking guidance on trust and estate issues. He implements sophisticated planning techniques on clients' behalf.

"I'm inspired by helping people," he said.

Clients and financial professionals work with and trust that Justin will take a thoughtful, deliberative approach to their matters, explain all the variables, and offer solutions that are clear and concise. He is particularly adept at solving complex estate and gift tax problems for high net worth clients. Clients have praised Justin for his ability to explain complex issues, listen to their needs and concerns, and find



Washburn University School of Law, J.D. *cum laude*, 2007

University of Kansas, B.S. Accounting, 2004; B.S. Business Administration, 2002

solutions to complex issues.

"My personal philosophy is that it's always about putting the client's needs first and being accessible to them when they need me," he said.

Among the services Justin provides individuals and families are:

- Drafting trusts, wills and corporate documents
- Estate planning
- Probate and trust administration
- Tax planning
- Trust and estate litigation

Justin also helps advise closely held businesses with:

- Business success planning and tax planning
- Formation of corporations, partnerships and limited liability companies
- Structuring of corporate reorganizations and recapitalizations

WHEN ASKED ...

Why did you become a lawyer?

I enjoy the opportunity to connect with clients and help them solve complex problems.

What do you do outside of work?

When not serving clients and the community, I'm involved in coaching youth sports and spending time with my family. I also have pilot and flight instructor certificates, both with instruments and ratings.

Events

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

Presentations

- Presenter, "Estate Planning Update," Recent Developments in Federal Taxes, UMKC School of Law Seminar, January 27, 2024
- Co-presenter, "Estate and Charitable Gift Planning with Retirement Assets and Closely-Held Businesses," Truman Heartland Community Foundation, October 26, 2023
- Presenter, "The Art of Estate Planning: Mastering the Complexities for Your Clients," Enterprise Elite Mastermind Webinar, August 24, 2023
- Presenter, "The Five Questions a Charity Should Ask When Presented with a Charitable Bequest," Mid-American Charitable Gift Planners, March 10, 2023
- Co-presenter, "Business Planning Strategies - Tips, Traps, and Common Mistakes in Estate Planning for Business Owners," Estate Planning Council of St. Louis, October 24, 2022
- Presenter, "Trust Drafting - Tax and Non-Tax Considerations," Kansas City Estate Planning Symposium, Fundamentals of Estate Planning, October 20, 2022
- Presenter, "Trust Litigation: The Who, What, Where and How," Kansas City Metropolitan Bar Association Probate and Trust Litigation CLE Program, November 12, 2021
- Presenter, "Estate Planning Issue Spotting for Financial Advisors," September 20, 2021
- Presenter, "Key Implications, Changes and Planning Strategies of the Tax Reform Bill," March 28, 2018
- Presenter, "Estate Plan Issue Spotting for Financial Advisors", Financial Planning Association of Greater Kansas City, May 10, 2023

Publications

- Author, "Estate Planning with Family Limited Partnerships," *Estate Planning Journal*, Vol. 49, No. 6, June 2022
- Co-author, "Revocable Trusts: Kansas, Practical Law Trusts & Estates," *Thomson Reuters*, 2020
- Co-author, "Power of Attorney (Kansas), Practical Law Trusts & Estates," *Thomson Reuters*, 2020
- Author, "Trust Modifications, Trust Terminations and Valid Settlement Agreements, Kansas Probate & Trust Administration after Death," *8th Edition, Kansas Bar Association*, 2018

- Co-author, "Estate Planning after the Tax Cuts and Jobs Act of 2017," *Ingram's*, 2018
- Co-author, "Has Your Estate Plan Entered the Digital Age?," *Ingram's*, 2018
- Co-author, "Revocable Trusts: Missouri," *Practical Law Trusts & Estates*, *Thomson Reuters*, 2018
- Co-author, "Power of Attorney (Missouri)," *Practical Law Trusts & Estates*, *Thomson Reuters*, 2018

Client Alerts And Blog Posts

- Legacy & Tax Planning in a Pandemic
April 27, 2020
- Estate Planning Alert: Impact of the SECURE Act on Inherited IRAs
January 15, 2020

In The News

- Kansas City Business Journal Features Partner Justin Whitney as New Member of Civic Council of Greater Kansas City's 2023-2024 Leadership Class
June 27, 2023
- Courtney Conrad and Justin Whitney Provide Guest Column to *Ingram's Magazine*
March 15, 2018

News Releases

- Six Lathrop GPM Attorneys Named Lawyer of the Year, 95 Ranked as The Best Lawyers in America©
August 18, 2022
- Five Attorneys Promoted to Partnership
January 10, 2022
- Missouri & Kansas Super Lawyers Recognizes 34 Lathrop GPM Attorneys
November 16, 2020
- Justin Whitney Joins Lathrop Gage's Wealth Strategies Team
December 30, 2019
- Super Lawyers Recognizes 47 Lathrop Gage Attorneys in Missouri and Kansas
November 14, 2018
- Super Lawyers Recognizes 57 Attorneys from Lathrop Gage in Missouri and Kansas

November 9, 2017

- Lathrop Gage Welcomes Justin W. Whitney in Kansas
July 13, 2016

Professional Affiliations

- Civic Council of Greater Kansas City, Kansas City Tomorrow Leadership Class, 2023-2024
- Heart of America Fellows Institute, The American College of Trust and Estate Counsel (ACTEC)
- Kansas Bar Association
- Missouri Bar
- Kansas City Metropolitan Bar Association

Community Involvement

- Children's Mercy Planned Giving Council, Member

Honors

- Selected among *The Best Lawyers in America*®, "Ones to Watch," 2023-2024
- American College of Trust and Estate Counsel, Heart of America Fellows Institute, 2021
- Selected for Missouri/Kansas *Super Lawyers* "Rising Stars" 2014-2019
- Myron E. Sildon Excellence in Estate Planning Award, Kansas City Estate Planning Society