Justin W. Whitney

Partner

Kansas City | Overland Park

D 913.451.5183

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 helps families and business owners organize and transition their complex estates in a tax-efficient manner with an acute awareness of the unique circumstances of their family and station in life, delivering substantive knowledge and common sense as an advisor, a resource, and a friend. He is a partner in Lathrop GPM's Trust, Estates & Legacy Planning group.

With significant experience advising high-net-worth families on complex estate and gift tax planning and business succession planning, Justin leverages his background as a certified public accountant and his legal master's degree in taxation to deliver tax-focused solutions to clients. His day-to-day practice involves the preparation of all varieties of trusts including:

- Basic revocable trusts
- Charitable remainder trusts
- Grantor-retained annuity trusts
- Intentionally defective grantor trusts
- Irrevocable generation-skipping transfer tax-exempt dynasty trusts
- Life insurance trusts
- Qualified personal residence trusts

Areas of Focus

Services

- Closely Held & Family Businesses
- Trust & Estate Litigation
- Private Client Services
- Emerging Growth Companies
- Community Banking

- Spousal lifetime access trusts

Justin also advises business owners on tax-free reorganizations of corporations, partnerships and limited liability companies, business succession planning, the formation of family limited partnerships, and advanced gifting strategies. He has an active trust and estate litigation practice where he advocates in court disputes between trustees and beneficiaries.

In addition to guiding clients on the technical nature of tax, estate and business laws, Justin is well-versed in complex interfamily dynamics and strives to promote family connectivity through communication and transparency. He regularly counsels business owners in ways to ensure that the fortune they spent a lifetime creating doesn’t destroy the family relationships they treasure the most.

Clients count on Justin to organize their affairs, plan their wealth and business transition, and then remain a constant and available resource for the rest of their lives as questions arise and life circumstances change. He endeavors to be the “keeper of the facts” for estate planning clients and a guide for their surviving family members. Clients count on Justin to manage their affairs for their families when their stage in life leaves them without the physical strength or mental acuity to do it on their own.

Credentials

Education

- University of Missouri-Kansas City School of Law, LL.M., Taxation, 2015
- Washburn University School of Law, J.D., 2007, cum laude
- University of Kansas, B.S., Accounting, 2004
- University of Kansas, B.S., Business Administration, 2002

Bar Admissions

- Kansas
- Missouri

Recognition

- Selected among *The Best Lawyers in America®*, “Ones to Watch,” 2023-2025
- *Chambers High Net Worth Guide*, “Leading Practitioner of Private Wealth Law,” 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

Presentations

- Presenter, "Trust Litigation," Catholic Advisors Network CLE Program, October 23, 2024
- Presenter, "Choosing Between Simple Wills and Trusts," Kansas City Estate Planning Symposium's Fundamentals of Estate Planning Program, October 17, 2024
- Presenter, "Estate Planning to Minimize Income Taxation," Kansas Bar Association's LawLawPalooza CLE, September 6, 2024
- Co-presenter, "Leaving a Legacy: Donor Advised Funds and Private Foundations," and "You've Been Served: Top Ten Questions for Inheritance Beneficiaries and Their Advisors in Litigation Cases," Truman Heartland Community Foundation's Professional Advisor Seminar Series, May 9, 2024
- 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

Professional Activities

- 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, Real Estate, Probate and Trust Section Executive Committee, 2024-present
- Missouri Bar
- Kansas City Metropolitan Bar Association
- Children’s Mercy Hospital Donald H. Chisholm Planned Giving Council, Member

Community Involvement

- Children's Mercy Planned Giving Council, Member