

# James D. Lamm

Principal, Trust, Estate & Charitable Planning Chair



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## Minneapolis, MN

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## Practices

- Family-Owned Business
- Charitable Gift Planning
- Trust, Estate & Charitable Planning
- Trust & Estate Litigation

## Education

- University of Minnesota Law School, J.D., *cum laude*
- St. John's University, B.A., *summa cum laude*, with all-college honors and distinction in the field of management

## Bar Admissions

- North Dakota, 1998
- South Dakota, 1998
- Minnesota, 1997

## Court Admissions

- U.S. District Court District of Minnesota, 1999
- U.S. Tax Court, 1999

Jim Lamm is a third-generation Minnesota estate planning and tax attorney and the chair of Gray Plant Mooty's Trust, Estate & Charitable Planning group. He focuses his practice on estate planning, tax planning, family business succession planning, probate and trust administration, and charitable giving. Jim works with executives, entrepreneurs, professional athletes, high-net-worth families, and family offices to achieve family goals, pass on family values, and plan for family businesses.

Jim is nationally known for his speaking and writing on advanced estate planning and tax topics, and he has been interviewed and quoted by *the Wall Street Journal*, *the New York Times*, *USA Today*, *the Washington Post*, *the Star Tribune*, *the Boston Globe*, *the Seattle Times*, the Associated Press, Reuters, *Forbes* magazine, *Intellectual Property Magazine*, Barron's, Bloomberg, *InvestmentNews*, Kiplinger's, Morningstar, the Pew Research Center, *Twin Cities Business*, *Minneapolis/St. Paul Business Journal*, MSNBC, KSTP television, KMSP television, National Public Radio, and more. Jim is a fellow in the American College of Trust and Estate Counsel (ACTEC), he is the current vice chair of ACTEC's Technology in the Practice Committee, and he was the founding chair of ACTEC's Digital Property Task Force. Jim has also been an adjunct associate professor teaching an Estate Planning and Drafting seminar at the University of Minnesota Law School.

Jim plans and prepares foundational estate planning documents for families including wills, revocable trusts (living trusts), financial powers of attorney, health care directives (living wills), and beneficiary designations for life insurance and retirement plans. Jim also works with families and family business owners to plan and implement trusts for children or grandchildren, irrevocable life insurance trusts (ILITs), spousal lifetime access trusts (SLATs), grantor retained annuity trusts (GRATs), qualified personal residence trusts (QPRTs), intentionally-defective grantor trusts (IDGTs), dynasty trusts, installment sales, split-dollar life insurance agreements, private foundations, donor advised funds, charitable remainder trusts, charitable lead trusts, prenuptial agreements, family limited partnerships and limited liability companies, and buy-sell agreements.

Jim also works with families, family offices, and other professionals to help them through the probate and estate settlement process, as well as to administer trusts, prepare tax returns, and resolve trust, estate, and tax disputes.

Jim blends a strong background in math, technology, and computer programming with his estate planning practice. He is a national thought leader in the area of estate planning for digital property, including a person's online accounts, electronic data, intellectual property rights, Internet domain names, and virtual currencies such as Bitcoin. Jim authors the **Digital Passing** blog, and he also coauthored the proposal for and actively participated in the drafting of the Uniform Law Commission's **Fiduciary Access to Digital Assets Act**.

## Honors / Activities

## Professional Activities

- Hennepin County Bar Association, Probate and Trust Law Section, past cochair, 2011–2012; cochair, 2010–2011; vice cochair, 2009–2010; and program cochair, 2008–2009

### Honors and Distinctions

- American College of Trust and Estate Counsel (ACTEC), Fellow
- *The Best Lawyers in America*®, 2010–2019
- AV® Preeminent™ Peer Review Rated Attorney, Martindale-Hubbell
- “Minnesota Super Lawyer®,” Thomson Reuters, 2013–2017
- “Top Rated Lawyers™ in Trusts & Estates,” American Lawyer Media & Martindale-Hubbell, 2013
- “Minnesota Rising Star®,” Thomson Reuters, 2004, 2006, 2009, 2011

### Community Involvement

- St. John’s University Planned Giving Committee, Member