

## Lisa D. McLaughlin

MANAGING MEMBER OF MGD LAW, LLC

Lisa McLaughlin has 40 years of experience in complex estate and trust planning for multi-generational families, wealth planning, probate and trust administration, fiduciary litigation and related tax and closely-held business areas of law. She also devotes much of her practice to charitable, nonprofit and tax-exempt entity law. The depth and breadth of Lisa's expertise allows her to serve the needs of individual clients with the full range of sophisticated estate planning techniques. She works with both individual clients and tax-exempt organizations to create, administer and provide advice regarding governance for charitable trusts, nonprofit corporations, private foundations, endowments and planned giving programs.

Within the Missouri legal community, Lisa has earned a reputation as a "lawyer's lawyer" who understands the tax and technical complexities of the estate planning and charitable planning field and can effectively guide less experienced or more general practitioners. She is a frequent speaker to both professional and lay audiences on estate planning and charitable planning topics.

An active volunteer leader in charitable and civic service for many years, Lisa currently serves as a Trustee and Chair of the Board of the Missouri Historical Society, a Director of YouthBridge Community Foundation and a Trustee of the Missouri United Methodist Foundation.

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### EDUCATION

- **Vanderbilt University School of Law** J.D., 1981
  - Vanderbilt Journal of Transnational Law, Student Writing Editor
  - Stanley Rose Memorial Prize for Legal History
- **Duke University** A.B., MAGNA CUM LAUDE, 1978

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### ADMISSIONS

- **Missouri** 1981
- **U.S. Tax Court** 2008

### PRACTICE AREAS

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#### Estate & Wealth Planning

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#### Advice for Trustees and Personal Representatives

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#### Trust and Estate Administration

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#### Tax Advice

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#### Estate Tax, Gift Tax, Generation-Skipping Transfer Tax and Fiduciary Income Tax Law

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#### Charitable and Nonprofit Advice

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#### Tax-Exempt, Charitable, Nonprofit, Endowment, Religious and Fraternal Entities

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#### Post Death Administration

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#### Advanced Planning

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#### Closely Held Businesses, Succession Planning

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#### Premarital and Post-Marital Agreements

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#### Fiduciary Litigation

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#### Guardianships and Conservatorships

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#### Taxation of Individuals, Corporations, Partnerships

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## PROFESSIONAL ASSOCIATIONS & MEMBERSHIPS

- **American College of Trust and Estate Counsel**  
FELLOW, ELECTED 2003
  - Member, Charitable Planning Committee
  - Member, Technology in the Practice Committee
- **American Bar Foundation** FELLOW, ELECTED 2014
- **Missouri Bar**
  - Member, Estate Planning and Probate Administration Committee
  - Member, Charitable Giving Committee
  - Member, Fiduciary Litigation Committee
- **Bar Association of Metropolitan St. Louis**
  - Former Chair, current Member, Probate and Trust Law Section
  - Former Chair, Tax-Exempt Organization and Non-Profit Law Committee
- **Estate Planning Council of St. Louis**
  - Former President
- **Planned Giving Council of St. Louis**

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## HONORS & AWARDS

- **Missouri & Kansas Super Lawyers** 2005–2020
  - Top 100 Lawyers 2014–2017
  - St. Louis Top 50 Lawyers 2015–2017
  - Top 50 Women Lawyers 2005–2017
- **AV® Preeminent™ Peer Review Rated**  
BY MARTINDALE-HUBBELL
- **Best Lawyers In America** 1995–PRESENT
- **Professional Advisor Legacy Award**  
PLANNED GIVING COUNCIL OF ST. LOUIS, 2013
- **Charles A. Dukes Award for Outstanding Volunteer Service**  
DUKE UNIVERSITY, 1995

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## COMMUNITY BOARDS

- **Missouri Historical Society** TRUSTEE, CHAIR OF BOARD, EXECUTIVE COMMITTEE MEMBER, DEVELOPMENT COMMITTEE MEMBER, JOINT BUDGET & OPERATIONS COMMITTEE MEMBER
- **Missouri United Methodist Foundation** TRUSTEE
- **Kappa Alpha Theta Fraternity**  
NATIONAL ARCHIVIST, PAST FOUNDATION TRUSTEE
- **Central Institute for the Deaf** BOARD MEMBER, FORMER CHAIR OF DEVELOPMENT COMMITTEE AND CAPITAL CAMPAIGN STEERING CABINET
- **YouthBridge Community Foundation**  
BOARD MEMBER, PAST CHAIR OF GOVERNANCE COMMITTEE
- **Missouri Conference of the United Methodist Church** PAST CHANCELLOR
- **Girl Scouts of Eastern Missouri**  
MEMBER OF FUND DEVELOPMENT COMMITTEE
- **HateBreakers** PAST BOARD MEMBER
- **Starkloff Disability Institute** PAST BOARD MEMBER
- **Campbell House Foundation/Museum**  
PAST PRESIDENT, EMERITUS BOARD MEMBER
- **Mary Institute & Saint Louis Country Day School**  
PAST EXECUTIVE COMMITTEE MEMBER, CHAIR OF PLANNED GIVING COMMITTEE
- **St. Louis Volunteer Lawyers and Accountants for the Arts** PAST BOARD MEMBER
- **Ready Readers** PAST BOARD MEMBER, ADVISORY BOARD MEMBER
- **American Red Cross St. Louis Chapter**  
PAST TREASURER
- **Noonday Club of Saint Louis** PAST PRESIDENT
- **Webster Hills United Methodist Church**  
PAST CHAIR OF TRUSTEES
- **Great Circle (formerly Boys & Girls Town of Missouri)** PAST BOARD MEMBER
- **Epworth Children's and Family Services**  
PAST BOARD MEMBER

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## TEACHING

- **Instructor, Non-Profit Law and Non-Profit Management**  
WASHINGTON UNIVERSITY 2012 – 2014