

Shane Swanson

PARTNER

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Office: Dallas, Minneapolis



Shane adds value and a unique perspective through critical thinking, analysis and a passion for what he does.

Shane provides strategic legal counsel to closely-held business owners, executives and wealthy clients. He applies his multidisciplinary background to advise on critical business and tax issues and resolve related litigation.

Shane has significant experience helping clients transition wealth from one generation to the next while minimizing the impact of transfer taxes. He works with clients to magnify wealth through philanthropic vehicles that accomplish client goals and tax minimization. Shane's trusted legal counsel extends to the sale of family businesses, real estate transactions and the resolution of contested matters between partners, among family members and with the IRS. Shane focuses on finding the simplest structure possible to achieve client goals while reducing ongoing administration costs.

EXPERIENCE

Shane works with high-net-worth and ultra-high-net-worth clients to minimize or eliminate transfer taxes using advanced planning techniques, including formula gifts of hard-to-value assets to fund spousal limited access trusts (SLATs) with over-gifts to charity to minimize audit risk; charitable trusts to expand

PRACTICES & INDUSTRIES

Tax, Trusts & Estates
Nonprofit Organizations, Charitable
Planning & Foundations
Estate & Trust Litigation
Private Business

ADMISSIONS

Minnesota
Texas
California
New York

EDUCATION

University of Minnesota Law School, J.D., *cum laude*, 1998
Texas Lutheran University, concurrent B.A.s, *magna cum laude*, 1994

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estate tax and generation-skipping transfer (GST) tax exemptions; and grantor trusts to transfer closely held businesses with limited or no transfer taxes.

He assists clients with tax, estate and trust administration planning, including probate for both solvent and insolvent estates.

Shane handles controversies arising in probate and trust administration and in disagreements with the IRS on compliance issues during audit examination.

He assist clients with disclosures related to public office.

Representative Cases Based on Planning

Estate of Marion Levine, Deceased, Robert L. Larson, Personal Representative, Petitioner v. Commissioner of Internal Revenue, Respondent, 158 T.C. No. 2, Feb. 28, 2022

Pierson M. Grieve, Petitioner v. Commissioner of Internal Revenue, Respondent, T.C. Memo. 2020-28, March 2, 2020

RECOGNITIONS

Selected by his peers for inclusion in *The Best Lawyers in America*® in the field of trust and estates

PROFESSIONAL & CIVIC ACTIVITIES

American Bar Association

Minnesota State Bar Association, Probate and Trust Law Section, Legislative Subcommittee

Hennepin County Bar Association

Philanthrofund Foundation, Past President and Board Member

Planned Parenthood of North Central States, Former Board Member and Chair

Everwood Farmstead Foundation, Former Board Member

Minneapolis Foundation Professional Advisors Committee, 2013 - 2016

The University of Minnesota-Lung Advisory Committee, 2012 - 2015

Magic of Charitable Giving Seminars, Committee Member, 2014

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NEWS

175 Stinson Attorneys Selected to the 2024 *Best Lawyers in America* List
08.17.2023

Stinson Attorneys Recognized in *Chambers' 2023 High Net Worth Guide*
07.24.2023

Stinson Again Achieves Mansfield Certification Plus
10.18.2022

152 Stinson Attorneys Selected to the 2023 *Best Lawyers in America* List
08.18.2022

103 Stinson Attorneys Selected to the 2022 *Best Lawyers in America* List
08.19.2021

112 Stinson Attorneys Selected to the 2021 *Best Lawyers in America* List
08.20.2020

SPEAKING ENGAGEMENTS

Co-authored, "What Matters Most...In Trust & Estates Practice," Minnesota CLE and Minnesota State Bar Association, September 2015

Co-authored, "Planning in Light of Minnesota's New Marriage Laws," Financial Planning Association of Minnesota, June 2014

Co-authored, "The Law of Unintended Consequences: How U.S. Citizenship in International Surrogacy Affects Foreign Tax and Immigration Issues," 2014 Spring Family Law CLE Conference, Southampton, Bermuda, BM, May 2014

Co-authored, "Income Tax, Estate Tax and Related Planning in Light of Minnesota's New Civil Marriage Law," Minnesota CLE and Minnesota State Bar Association's Family Law Section, Family Law Institute, March 2014

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