



## JAMES J. LANHAM

Chief Operating Officer

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### EDUCATION OVERVIEW

The University of Akron School of Law, J.D., Akron Law Review

For four decades, Jim Lanham has provided a full spectrum of legal services to The College of Wooster and its businesses as they plan for the future. Utilizing sophisticated wealth planning techniques, Jim delivers personal and individualized advice to each client, focusing on the nuances that make every client's situation

### ADMISSIONS

Fellow with ACTEC (American College of Trust and Estate Counsel), which is a preeminent national organization for estate planning attorneys. Jim is also a member of the Ohio State Bar Association's Estate

Planning, Trust and Probate Law Section Council, which crafts Ohio legislation in estate, trust, and probate law. He is also a charter member of the Ohio State Bar Association's Certified Specialists in Estate Planning, Trust and Probate Law. In

### CERTIFICATIONS

addition to his work with estate planning, Jim advises many businesses on Probate Law (charter member). He is a licensed title agent, handling commercial and residential real estate deals. Licensed Ohio Title Insurance Agent

In addition to his responsibilities to his clients, Jim has contributed his time to numerous charitable organizations, including service as Past President of the

### RECOGNITIONS

Business and Industry Club and past Chair of Goodwill Industries of Wayne and Holmes Counties. He currently serves on the board of Learn N Play of Wooster, a sliding scale childcare center, and as long-time Treasurer of Peewee Hollow, Inc., a Scouting America-related fundraising organization for Scouts. Jim also actively educates others through speaking engagements across the firm's geographic footprint and as the author of many published articles and client alerts on topics related to estate planning, trust, and wealth and succession planning.

### AFFILIATIONS

<https://www.actec.org/directory/profile/Lanham-Jame>  
Ohio State Bar Association

2015-2016  
Fellow The American College of Trust and Estate Counsel (ACTEC)  
Named to The Best Lawyers in America® for Trusts and Estates (2022-2026)  
AV Preeminent® rating from Martindale-Hubbell® Peer Review Ratings  
16x ACTEC Court Bar Association

### PRACTICE AREAS

#### CORPORATE AND BUSINESS

COMPANY FORMATION AND  
BUSINESS PLANNING  
CORPORATE GOVERNANCE

#### ESTATE PLANNING, PROBATE, AND TRUST ADMINISTRATION

BUSINESS SUCCESSION PLANNING  
CHARITABLE PLANNING  
FAMILY AND PRIVATE TRUST  
COMPANIES  
GUARDIANSHIPS  
PRE-NUPTIAL AGREEMENTS  
PRIVATE ADOPTIONS  
SOPHISTICATED ESTATE PLANNING

#### MERGERS AND ACQUISITIONS

#### REAL ESTATE

PURCHASE, SALE AND LEASING  
TITLE INSURANCE, ESCROW AND  
CLOSING

## IN THE COMMUNITY

- Akron Community Foundation, Member, Professional Advisor Council
- Wooster Kiwanis Club, Past President
- Wayne – Holmes Estate Planning Council
- Pee Wee Hollow, Inc. Scout Camp, Treasurer
- Learn N Play, Board Member

## SPEAKING ENGAGEMENTS

- Statutory Changes / Updates in Probate Law; Case Law Update; Local Rules Wayne County Probate, CLE sponsored by Wayne County Probate Court (2021)
- Dynasty Trusts, CLE sponsored by The Commercial & Savings Bank (2021)
- Comparing and Contrasting the Probate Code with the Ohio Rules of Superintendence, Ohio State Bar Association CLE (2021)
- SLATS in 2021, Worthington Estate Planning Council (2021)
- Charitable Trust Planning, Medina County Estate Planning Council (2020)
- The Secure Act, Heart of Ohio Estate Planning Council (2020)

## PUBLICATIONS

- “Revisiting the Probate Practitioner’s Oxymoron: Comparing and Contrasting the Probate Code with the Ohio Rules of Superintendence,” 32 **PLJO** 84 (Nov/Dec 2021)
- “Amended Ohio Revised Code § 2106.13: Reduction in Allowance For Support Applies Only If Multiple Vehicles Selected by Surviving Spouse,” 31 **PLJO** 118 (Jan./Feb 2021)
- “Eating Your Cake and Still Having it Too: Using CLATs for a Charitable Deduction,” Advisor Insights, a publication of the Akron Community Foundation (Fall 2020)
- “Conflicting Redundant Laws: the Probate Practitioner’s Oxymoron (Reconciling Supreme Court Probate Rules and the Revised Code),” 22 **PLJO** 235 (May/June 2012, co-author Matthew R. Hochstetler).
- “The New Recording Statute’s Impact on Estate Planning and Administration,” 20 **PLJO** 12 (Sept./Oct. 2009).
- “Three Pets Named “Peeve”: Ohio’s Annual Exclusion Parts 1 and 2, and TODs for Stuff,” 19 **PLJO** 159 (March/April 2009).
- “Ambiguity in the New Medicaid Estate Recovery Statute of Limitations: Who’s Kicking Whom?,” 14 **PLJO** 27 (Nov./Dec. 2003).
- “Estate Tax Loophole Closed for Summary Release,” 13 **PLJO** 42 (Jan./Feb. 2003).
- “Did They Mean What They Said and Say What They Mean? Did Our Legislature Already Eliminate Ohio Estate Taxes?,” 13 **PLJO** 13 (Sept./Oct. 2002).
- “Reconsidering Ohio’s Memorandum of Trust Statute,” 5 **PLJO** 39 (Jan./Feb. 1995).
- “Considerations for Collecting Assets” NBI Seminar presentation

- “Ethical Challenges in Estate Administration” NBI Seminar presentation
- “The New Uniform Power of Attorney Act and other SB 117 Law Changes”  
Heart of Ohio Estate Planning Council presentation
- “IRS OKS DSUE QTIP IN REV PROC 2016-49,” 27 **PLJO** 1 (Nov./Dec. 2016).
- “Catch-22 for Ohio Incompetents: In re Cicchella,” 25 **PLJO** 5 (Jan./Feb. 2015).
- “Fixing Ohio’s Obsolescent Law for Decedents’ Safe Deposit Boxes,” 24 **PLJO**  
250 (Mar./April 2014).