



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 over three decades, Jim Lanham has provided a full spectrum of legal services to individuals, families, and businesses as they plan for the future. Utilizing

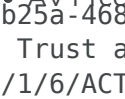
sophisticated wealth planning techniques, Jim delivers personal and individualized advice to each and every client, focusing on the nuances that make every client's

ADMISSIONS He has recently been recognized for his skills in this area by the American College of Trust and Estate Counsel, which invited him to join the organization as a Fellow. In addition to his work with estate planning, Jim advises a number of businesses on governance and acquisitions, and is a licensed title agent along with handling commercial and residential real estate deals.

CERTIFICATIONS

Ohio State Bar Association Certified Specialist in Estate Planning, Trust and Probate Law, Charitable Organizations, including service as Past President of the Wooster Kiwanis Club. He is serving as the Past Chair of Goodwill Industries of Wayne and Holmes Counties. Jim also actively educates others through speaking engagements across the firm's geographic footprint and as the author of a number of published articles and client alerts on topics related to estate planning, trust, and wealth and succession planning.

RECOGNITIONS

- Fellow, The American College of Trust and Estate Counsel (ACTEC) <https://www.actec.org/directory/profile/Lanham-James/>
- Named to The Best Lawyers in America® for Trusts and Estates (2022-2024)
- AV Preeminent® rating from Martindale-Hubbell® Peer Review Ratings™
-  https://www.actec.org/assets/1/6/ACTEC_Fellow-150x150.png

AFFILIATIONS

- American Bar Association
- Ohio State Bar Association
 - Estate Planning, Trust and Probate Law Section, Area Delegate
- Wayne County 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
- Goodwill Industries of Wayne and Holmes Counties, Past Chair
- Pee Wee Hollow, Inc. Scout Camp, Treasurer

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).