Larkin Hoffman

Tara D. Mattessich

Of Counsel

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Tara D. Mattessich counsels individual clients in all areas of estate planning, including simple and complex wills, marital deduction planning, credit shelter and bypass trusts, revocable trusts, prenuptial agreements, powers of attorney, health care directives, and other related areas. She also has deep experience advising nonprofit and tax-exempt organizations on a wide array of issues, including compliance with applicable statutes, rules and regulations, adoption and amendment of articles and bylaws, board training and governance issues, application for tax-exempt status and development of corporate policies.

Services

- Education
- Estate Planning and Probate
- Nonprofit

Representative Experience

Estate Planning and Probate

- Helps clients to understand how their circumstances will affect their estate: what they own, how they own it, and who will receive it at death.
- Works with clients to create an appropriate estate plan, taking into account the client’s property, family situation, and goals.
- Identifies how property will pass at death through wills and trusts.
- Establishes powers of attorney and health care directives.
- Provides estate, gift, and income tax planning and preparation to address key tax questions.
- Helps families when a loved one has died, addressing key questions regarding wills, property transfer, determining beneficiaries and tax responsibilities.

Trust Administration

- Represents trustees and beneficiaries in trust and trust administration matters, educating them on trustee responsibilities, identifying beneficiaries, tax implications and maintaining trust terms.
- Handles court filings and advocates for clients in estate and trust court proceedings, as appropriate.
- Serves as the trustee or beneficiary’s advocate and intermediary in communications with other trustees and/or beneficiaries.

Charitable Planning – Individuals and Institutions

Tara advises clients on issues related to planning charitable contributions, including:

- Charitable gifts at death
- Gifts through wills and trusts
- Beneficiary designations
- Charitable remainder trusts
- Charitable lead trusts
- Private foundations
- Charitable gift annuities
- Placing restrictions on charitable gifts
- Tax implications for gifts while alive as well through an estate
- Gift acceptance policies
- Interpretation of charitable instruments

Nonprofit

Tara counsels nonprofit and tax-exempt organizations on issues unique to them, such as:

- Preparation of articles, bylaws, resolutions for nonprofit corporations, limited liability companies, and charitable trusts
- Preparation of IRS Form 1023 and seeking federal tax-exempt status under 501(c)(3), (c)(4), (c)(6), and other sections of the Internal Revenue Code
- Nonprofit mergers and acquisitions
- Corporate governance, board-of-director and officer training
- Sales and property tax exemptions
- Registration with and reporting to the Minnesota Attorney General
- Professional fundraising questions
- Charitable gambling
- Lobbying
- Employee benefits issues

Education

- University of Minnesota Law School (J.D., cum laude)
- St. Olaf College (B.A.)

Bar/Court Admissions

- U.S. District Court, District of Minnesota
- Wisconsin

Recognition

- Five Star Wealth Manager, Mpls.St.Paul and Twin Cities Business magazines
- 2014 Five Star Estate Planning Attorney, Five Star Professional

- 2015 Service to MWL Award, Minnesota Women Lawyers