



SHANNON K. BARKS

Partner

Kansas City

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BIOGRAPHY

Shannon Barks has a diverse practice that encompasses a wide range of estate planning, tax planning, and litigation services. She regularly assists clients with planning for wealth preservation, crafting comprehensive estate planning documents that align with her clients' long-term goals. Her expertise includes the implementation of sophisticated tax reduction strategies, tailored to minimize tax liabilities while preserving family wealth.

Shannon is experienced in the administration of complex estates and trusts, guiding fiduciaries and beneficiaries through the intricate processes involved. She has been called upon as an expert witness in trust and estate matters, bringing her deep knowledge to bear in contentious situations.

In addition to her estate planning work, Shannon has significant experience in charitable planning. She assists clients in the creation and establishment of tax-exempt organizations and private

foundations, ensuring compliance with legal requirements while maximizing philanthropic impact. Shannon also provides ongoing counsel to tax-exempt organizations on a range of operational and compliance issues.

Her practice extends to business succession planning, where she advises owners of closely held businesses on tax-efficient strategies for transferring ownership and preserving business continuity. She also works on premarital and postmarital agreement planning, helping clients navigate the legal implications of marriage on their estates.

Shannon is well-versed in special needs trust planning, ensuring that the needs of beneficiaries with disabilities are met without compromising their eligibility for government benefits. She also represents clients in trust and estate litigation, where her blend of technical knowledge and practical experience is invaluable. Furthermore, Shannon advises on estate-related income tax planning, helping clients navigate the complex intersection of estate and income tax laws.

CIVIC INVOLVEMENT & HONORS

- Fellow, American College of Trust and Estate Counsel (ACTEC)
- Best Lawyers®, "Lawyer of the Year," Litigation – Trusts and Estates, Overland Park, 2015; Kansas City, Missouri, 2018, 2020, 2023
- The Best Lawyers in America®, 2011-Present
- Missouri/Kansas Super Lawyers, 2013-Present
- Superlawyers Top 50 Women Lawyers in Missouri and Kansas – 2017, 2019
- Martindale-Hubbell® "AV" Rating
- Martindale-Hubbell®, "Bar Register of Preeminent Women Lawyers," 2012-2014
- Rose Brooks Center, Board of Directors, 2015
- Wayside Waifs, Board of Directors, 2007-2014; Executive Committee, 2009-2013; Secretary, 2009-2010; Chair-Elect, 2011; Board Chair, 2012-2013
- Children's Mercy Hospital Donald H. Chisholm Planned Giving Council, 2000-present, Executive Committee, 2006-present; Chair, 2009-2010
- Safelife, Board of Directors, 2006-2008

- Johnson County Arts Council, Shooting Stars Scholarship Award Program, Chairperson, 2006
- Johnson County Arts Council, Board of Directors, 2005-2007

PROFESSIONAL AFFILIATIONS

- American College of Trust and Estate Counsel, Board of Regents; Heart of America Region Chair; Missouri State Chair, State Law Committee; Program Committee
- Chancellor, American College of Trust and Estate Counsel, Heart of America Institute.
- Kansas City Estate Planning Symposium, Board of Directors, 2018-2021
- Kansas Bar Association
- Kansas Bar Association, Real Estate Probate and Trust Committees; Executive Committee
- Kansas Judicial Council, Probate Law Advisory Committee
- Missouri Bar Association
- Missouri Bar Association Estate Trust & Elder Law Institute Planning Committee (2016-2017)
- The Missouri Bar, Probate and Trust Committee
- Kansas City Metropolitan Bar Association
- Johnson County Bar Association
- Estate Planning Society of Kansas City, 1999-present; Director, 2013-2014; Asst. Secretary, 2015

SPOKEN LANGUAGES

- French

ADMISSIONS

- Missouri, 1991
- Kansas, 1990

EDUCATION

The American College of Financial Services, Chartered Financial Consultant, 1998

The American College of Financial Services, Chartered Life Underwriter, 1997

University of Kansas, J.D., 1990

Wichita State University, B.A., 1987

RELATED PRACTICE AREAS

- Private Client
- Litigation & Dispute Resolution
- Corporate
- Tax & Private Client
- Fiduciary Disputes
- Non Profit Organizations

RESOURCES

PUBLICATIONS

- Author, Chapters 3, 6, 18-20, *Kansas Basic Will and Trust Drafting*, Published by the Kansas Bar Association
- Author, "No Contest Clauses in Kansas," *The Journal of the Kansas Bar Association*, September 2013
- Co-Author, "Chapter 11-2013 Supplement Estate Planning Considerations," *KBA Family Law Practitioner's Guide*
- Article, "Waive Hello to New Charitable Remainder Trust Spousal Consent Rules," *Children's Mercy Hospital's Estate Planning Matters*, Fall 2005 Issue
- Author, "Tax Advantaged Retirement Planning: Selling Life Insurance in the Roth IRA Market," *Journal of the American Society of CLU & ChFC*, July 1998 (Winner, Journal Author Award)

SPEAKING ENGAGEMENTS

- "Discussion of General Powers of Appointments," 2nd Annual Trust and Estates Disputes Symposium, St. Louis, August 29, 2019

- "Life Insurance and Other Planning in the Era of the Potential Death of the Death Tax," Kansas City Estate Planning Symposium, April 2018
- "No More Wandrying in the Dark: Illuminating Defined Value Clauses," ACTEC 2016 Mo-Kan Conference, December 2016
- "Disclaimers," Estate, Trust and Elder Law Institute, Missouri Bar Association, August 2016
- "Recent Developments in Federal Law Affecting Estates and Trusts," 2015 Annual Estate and Trust Institute, September 2015
- "Valuation Discounts: When Restrictive Terms in Buy-Sell Agreements are Disregarded," ACTEC 2014 Mo-Kan Conference, December 2014
- "Disclaimers," The Practical Guide to Probate and Estate Administration, February, 2012, January 2013, January 2014, February 2016, February 2017, February 2018
- "Probate Procedure Under Chapter 59," Return to Green CLE, April 20, 2012
- "Kansas Probate Administration – Decedents' Estates," Johnson County Bar Association Law Practice Skills 101, October 27, 2011
- "Portability: The New Estate Planning Fix?" Estate Planning Internship Program, October 20, 2011
- "Modification and Termination of Trusts," 26th Annual Plaza Lights Institute, Kansas Bar Association, December, 2008
- "Estate Planning Essentials," Moving Forward Together MS Conference and Expo - National Multiple Sclerosis Society, Mid America Chapter, November, 2008
- "Estate Planning for Non-Citizen Spouses," Douglas County Estate Planning Society, January 2008
- "Small Business Workshop," Johnson County Community College, October 2007
- "Finding the Best Baskets for Your Eggs," Kansas State Treasurer's Office, October 2005
- "Practical Estate Planning Solutions," Kansas City Chapter, Women's Life Underwriter's Association, October 2005
- "Missouri and Kansas Estate Tax after the Economic Growth and Tax Reconciliation Relief Act of 2001," Kansas City Chapter, Missouri Society of Certified Public Accountants, September 2005

- "New Developments in Estate Planning," Johnson County Bar Association, October 2004
- "HIPAA Privacy Regulations: How Do They Impact Estate Planning?" Douglas County Estate Planning Society, September 2004
- "New Developments in Estate Planning," Kansas City Chapter, Society of Financial Service Professionals, September 2004
- "State and Federal Legislative and Case Law Update - Estate Planning," Annual Plaza Lights Institute, Kansas Bar Association, December 2003
- "Kansas Inheritance Tax and Succession Tax," Third Annual CLE Slam Dunk, Kansas Bar Association, February 2003
- "Cutting Edge Estate Planning," Annual Estate and Trust Institute, The Missouri Bar, October 2002

RELATED INSIGHTS

Awards

Aug 17, 2023

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Awards

Aug 18, 2022

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