MASLONLLP



SUSAN J. LINK

Senior Counsel

Phone:

OVERVIEW

Susan Link practices in the areas of estate planning, probate, and trust administration. She works closely with families to plan the disposition of their assets, both during lifetime and at death, and to accomplish the optimal estate and gift tax planning for clients through wills, trusts, and other instruments. Susan routinely drafts estate plans that include estate tax and generation-skipping tax planning, in addition to drafting and implementing irrevocable trusts, charitable trusts, qualified personal residence trusts, minors' trusts, antenuptial agreements, and postnuptial agreements. She is regularly involved in the analysis and issues of lifetime gifting programs, estate tax planning, and generation-skipping issues.

Susan also works with families after the death of a family member to ensure that the client's wishes are achieved and that the plan they created is carried out. If appropriate, Susan also advises estate and trust beneficiaries during administration in order to maximize their own planning options relative to their share of a decedent's estate through the use of disclaimers and powers of appointment.

Susan served as the chair of Maslon's Estate Planning Group from 2007-2018, and she currently serves as the program director of Minnesota Wills for Heroes. The Wills for Heroes program, sponsored by the Minnesota State Bar Association, is designed to provide free legal services for the preparation of basic estate planning documents for Minnesota first responders. She is recognized as a Notable Practitioner in Minnesota for Private Wealth Law in *Chambers High Net Worth (HNW)* (2018-2025), a member of the American College of Trust and Estate Counsel, and she has taught as an adjunct professor at the University of St. Thomas School of Law.

LEADERSHIP & COMMUNITY

- Maslon LLP: Board of Directors Member 2022-2025
- Minnesota Wills for Heroes Program, Minnesota State Bar Association: Program Director and Volunteer

AREAS OF PRACTICE

Estate Planning

- Business Succession Planning
- Charitable Giving & Foundations
- Estate & Gift Tax Controversies
- Estate Planning, Wills & Trusts
- Prenuptial & Postnuptial Agreements
- Probate & Trust Administration
- Retirement Benefit Planning
- Tax Saving Strategies
- Trust & Estate Litigation

BAR ADMISSIONS

Minnesota

EDUCATION

University of Notre Dame Law School
J.D., 1986

Loyola University Chicago
B.A., *magna cum laude*, 1983
Political Science

- American College of Trust and Estate Counsel: Fellow 2004-Present
- The Basilica of St. Mary: Trustee 2021-Present
- The Basilica Landmark: Board of Directors 2012-2018; Planned Giving Committee, Chair
- Minnesota State Bar Association: Probate & Trust Law Section, Public Service Committee Co-Chair; Governing Council Chair 2010, Member 2001-2007; Minnesota Wills for Heroes Committee, Chair since 2006; Committee on Ethics and Professional Responsibility 2002-2007
- The Joseph Durda Foundation: Board Member
- Women Presidents Organization: Minnesota Chapter 2008-2018
- University of St. Thomas School of Law: Adjunct Professor of Estate Planning and Taxation of Gifts 2006; Wills, Estates and Trusts 2005
- Stillman Family Foundation: Board Member
- Cars Against Crime: Board Member
- Hennepin County Bar Association

SELECTED HONORS

- **2023 Minnesota ICON Award,** *Finance & Commerce (The Minnesota Icon awards recognize individuals with proven success throughout a lengthy and accomplished career. These honorees are leaders in their field who have been active in their communities and in mentoring the next generation.)*
- **Notable Practitioner in Minnesota for Private Wealth Law**, *Chambers High Net Worth (HNW)*, 2018-2025
- **Top 50 Women Minnesota Super Lawyers® list**, 2012-2023 (*The "Top 50 Women Lawyers" list features attorneys who received the highest point totals in the yearly Minnesota Super Lawyers® balloting, research and blue ribbon review process.*)
- **Top 100 Minnesota Super Lawyers® list**, 2012, 2014-2023
- **Recognized on Minnesota Super Lawyers® list**, 2002-2026 (*Minnesota Super Lawyers® is a designation given to only 5% of Minnesota attorneys each year, based on a selection process that includes the recommendation of peers in the legal profession.*)
- **Top Women Attorneys in Minnesota® list,** 2012-2025 *(The annual edition of the Top Women Attorneys in Minnesota list features attorneys selected for the previous year's Minnesota Super Lawyers® and Rising Stars lists.)*
- **Selected for inclusion in *The Best Lawyers in America*®**, 2011-2025
- **Attorney of the Year for Outstanding Service to the Profession**, *Minnesota Lawyer*, 2018
- **North Star Lawyer**, Minnesota State Bar Association, 2013-2025 *(North Star Lawyer is a designation that recognizes members who provide 50 hours or more of pro bono legal services in a calendar year.)*
- **Recognized as a Top Lawyer**, *Minnesota Monthly*, 2024 (The research for the Top Lawyers list, created by Professional Research Services, is based on an online peer-review survey sent to all attorneys in Minnesota.)
- **Recipient of the Hennepin County Sheriff's Distinguished Service Award**, 2018 (For leadership and contributions to the Minnesota Wills for Heroes Program.)
- **Recipient of the Minneapolis Fire Department Meritorious Service Award**, 2018 **(**For leadership and contributions to the Minnesota Wills for Heroes Program.)
- **Pro Bono All Star**, Minnesota State Bar Association, 2020 (*Pro Bono All Star is a designation that recognizes MSBA members who have been recognized as North Star Lawyers for seven or more years*.)
- **Recipient of the 2018 Excellence Award for Advancing Innovation in the Profession**, Hennepin County Bar Association, 2018
- **Recognized as a 2017 (Real) Power 50 Winner**, *Minnesota Business* magazine, 2017
- **Recognized on Women in the Law**, Trusts and Estates list, *Best Lawyers*® Business Edition, 2016
- **Fellow**, American Bar Foundation, 2015
- **Named a "Twin Cities FIVE STAR Wealth Manager**,**"** *Twin Cities Business*, 2009-2010, 2013
- **Eugene P. Daly, Jr. Award**, Minnesota State Bar Association, 2012

- **Top 10 Minnesota Super Lawyers® list**, 2014
- **Top 100 Women Minnesota Super Lawyers® list**, 2005-2009 (list discontinued thereafter)
- **Listed as a Top 100 Attorney**, *Worth* magazine, November 2007
- **President's Award**, Minnesota Wills for Heroes Program, Minnesota State Bar Association, 2007
- **AV Preeminent**, Martindale-Hubbell®

SELECTED PRESENTATIONS

- Maslon's Inaugural Forum on Wealth Management and Litigation
- "2024 Probate Panel: Reviewing and Resolving the Latest Issues in Probate Administration," moderator, 2024 Probate and Trust Law Section Conference, Minnesota CLE, 2024
- "Opening an Estate, Inventory, and Disclaimers," co-presenter, Probate A to Z Webcast Series, Minnesota CLE, 2024.
- "2023 Probate Panel: Reviewing and Resolving the Latest Issues in Probate Administration," moderator, 2023 Probate and Trust Law Section Conference, Minnesota CLE, 2023
- "2023 ABCs of Probate Practice in Minnesota," course chair and co-presenter, Minnesota CLE, 2023
- "Opportunity & Impact: Pro Bono Work and Nonprofit Board Service," co-presenter, Minnesota Women Lawyers, 2023
- "2022 Probate Panel," moderator, Probate & Trust Law Section Conference, Minnesota CLE, 2022
- "Developing an Estate Plan That Includes Charitable Giving and Trusts: A Scenario-Based Discussion," moderator, Probate & Trust Law Section Conference, Minnesota CLE, 2022
- Michael Sampson and Susan Link to Present at the 2022 Probate & Trust Law Section Conference for Minnesota CLE
- Maslon Estate Planning Attorneys to Present at the 2022 Estate Administration in Minnesota Seminar for Minnesota CLE
- "Opening an Estate, Inventory, and Disclaimers," co-presenter, Estate Administration in Minnesota Seminar, Minnesota CLE, 2022
- "Probate A to Z Series – 02: Opening an Estate, Inventory, and Disclaimers," co-presenter, Minnesota CLE, 2022.
- "Charitable Giving and Trusts: How to Maximize the Benefits of Philanthropy for Your Clients," seminar chair, Minnesota CLE, 2021
- "Developing an Estate Plan That Includes Charitable Giving and Trusts: A Scenario-Based Discussion," moderator, Charitable Giving and Trusts seminar, Minnesota CLE, 2021
- Wills For Heroes, ED Talk, MSBA Convention, 2021
- "2021 Probate Panel," moderator, Probate & Trust Law Section Virtual Conference, Minnesota CLE, 2021
- "Key Issues in Formal Probate," The ABCs of Probate Practice in Minnesota, Minnesota CLE, 2021
- The ABCs of Probate Practice in Minnesota, course chair, Minnesota CLE, 2021
- 2020 Probate Panel, moderator, The Probate & Trust Law Section Conference, Minnesota CLE
- "Opening an Estate, Inventory, and Disclaimers," Probate A to Z Webcast Series, Minnesota CLE, 2019
- "What Every Paralegal Must Know About Estate Administration," 2019 Probate & Trust Law Section Conference, Minnesota CLE, 2019
- "2019 Probate Panel," moderator, 2019 Probate & Trust Law Section Conference, Minnesota CLE, 2019
- "Wills for Heroes," 2019 Probate & Trust Law Section Post Conference Webcast, Minnesota CLE, 2019
- "What Veterans Should Know About Estate Planning," Camp Ripley, 2019
- "Wills & Estate Planning," NALS Twins Cities Educational Lunch & Learn, 2019
- Susan Link, Michael Sampson, and Cindy Costello to Present at Minnesota CLE's The ABCs of Probate Practice in Minnesota Seminar
- "What Every Paralegal Must Know About Estate Administration," A Paralegal's Guide to Estate Administration, Minnesota CLE, 2018
- "Probate Panel," moderator, The 44th Annual Probate & Trust Law Section Conference, Minnesota CLE, 2018

- Maslon Estate Planning Professionals to Present at the 2018 Probate & Trust Law Section Conference for Minnesota CLE
- "Opening an Estate, Inventory, and Disclaimers," Probate A to Z Webcast Series, Minnesota CLE, 2018
- "Probate Panel – Have You Ever Encountered This?" moderator, The 43rd Annual Probate & Trust Law Section Conference, Minnesota CLE, 2017
- "Understanding Generational Wealth Management & Transfer," Stonebridge Capital Advisors, 2017
- "Managing Fiduciary Liability and Risk: The Trust Litigator's & Planner's Perspectives," Lurie, LLP, 2017
- "Financial Challenges and Planning for Widows, Widowers, Caregivers and Singles," University of Minnesota Retirees Association, 2017
- What Matters Most 2016 in Trusts & Estates Practice, chair, Minnesota CLE, 2016
- "The Elephant (or the Donkey) in the Room – The Probate Panel," moderator, 2016 Probate & Trust Law Section Conference, Minnesota CLE, 2016
- "Key Issues in Formal Probate," The ABC's of Probate Practice in Minnesota, Minnesota CLE, 2015
- "Estate Planning for the Gray Divorce," The Gray Divorce: Unique Challenges for Parties Over Fifty, The American Academy of Matrimonial Lawyers - Minnesota Chapter, 2015
- Susan Link, Michael Sampson, and Cindy Costello to Present at the 2015 Probate & Trust Law Conference for Minnesota CLE
- "Gray Areas in Probate Proceedings," 2015 Probate & Trust Law Section Conference, Minnesota CLE, 2015
- Susan Link, Michael Sampson, and Cindy Costello to Present at Fundamentals of Probate Practice in Minnesota Seminar for Minnesota CLE
- "Key Issues in Formal Probate," Fundamentals of Probate Practice in Minnesota, Minnesota CLE, 2014
- Susan Link, Michael Sampson, and Cindy Costello to Present at Minnesota CLE's 40th Annual Probate & Trust Law Section Conference
- "Doesn't Everyone Else Do This? The Probate Practitioner's Panel," 40th Annual Probate & Trust Law Section Conference, Minnesota CLE, 2014
- "What does it take?" Dream Big: Explore the Possibilities, Minnetonka High School Winter Leadership Conference, 2014
- "Key Issues in Formal Probate," Fundamentals of Probate Practice, Minnesota CLE, 2013
- "Probate Tidbits - A Practical Panel," 39th Annual Probate and Trust Law Section Conference, Minnesota CLE, 2013
- "Traditional and Changing Resources to Accomplish the Non-Probate Estate," The Non-Probate Roadmap: Administering the Non-Probate Estate, Minnesota CLE, 2012
- "Probate Panel: What Do Other Practitioners Do?" 38th Annual Probate & Trust Law Section Conference, Minnesota CLE, 2012
- "Matt Homann – Building a Successful 21st Century Practice: Estate Planning/Probate," webcast, Minnesota CLE, 2012
- "How to Open an Estate," The *Minnesota Estate Administration Deskbook* Seminar, Minnesota CLE, 2012
- "Cryptic Tales – a Probate Practitioner's Panel," 37th Annual Probate & Trust Law Section Conference, Minnesota CLE, 2011
- "Probate for Paralegals: How to Efficiently Administer Decedents' Estates," Minnesota CLE, 2011
- "Large Estates Panel - Planning, Administration and Drafting Issues, Estate Planning 2011 & Beyond," Minnesota CLE, 2011
- "Minnesota Probate Practice A-Z Seminar," Minnesota CLE, 2010
- "Dead Head's 101 – A Private Practitioner's Panel," 36th Annual Probate and Trust Law Section Conference, Minnesota CLE, 2010
- "Probate and Estate: *Minnesota Estate Administration Deskbook* Update," webcast, Minnesota CLE, 2010
- "Minnesota Probate Practice A-Z," Minnesota CLE, 2009

- "Probate Law – Didn't They Teach You That in Law School," 35th Annual Probate and Trust Law Section Conference, Minnesota CLE, 2009
- "Probate Practitioner's Panel," 34th Annual Probate and Trust Law Section Conference, Minnesota CLE, 2008
- "Wills for Heroes," 34th Annual Probate and Trust Law Section Conference, Minnesota CLE, 2008
- "Wills for Heroes," 2008 Pro Bono Conference, National Federation of Paralegal Associations, Inc. (NFPA) and NFPA's Pro Bono Committee, Minneapolis, Minnesota, 2008
- "Formal Probate," Fundamentals of Probate, Minnesota CLE, 2000, 2003-2008
- "The New Lawyer Experience," Minnesota CLE, 2008
- "Handling Estate Administration in Minnesota," Minnesota CLE, 2007
- "Opening an Estate, Inventory and Disclaimers," Minnesota Estate Administration, 3d Edition, Minnesota CLE, 2007
- "Creditor's Claims," Minnesota Estate Administration 3d Edition, Minnesota CLE, 2007
- "Alzheimer's: Issues & Solutions for Minnesota Attorneys and Caregivers," Minnesota Estate Administration 3d Edition, Minnesota CLE, 2006
- "Productivity, Profitability, and Paralegals in your Probate Practice," 31st Annual Probate and Trust Law Section Conference, Minnesota CLE, 2005
- "Ethics and Professional Responsibility," 30th Annual Probate and Trust Law Section Conference, Minnesota CLE, 2004
- "Opening an Estate," 28th Annual Probate and Trust Law Section Conference, Minnesota CLE, 2002
- "Opening an Estate," Minnesota Estate Administration, Minnesota CLE, 2002
- "Opening Forms," Fundamentals of Probate, Minnesota CLE, 1996, 1997, 1999
- "Drafting QPRTs," 23rd Annual Probate and Trust Law Section Conference, Minnesota CLE, 1997
- "Estate Planning: Oh to Be Rich and Famous," *Minnesota Law and Politics*, 1997
- "Key Issues in Formal Probate," Fundamentals of Probate, Minnesota CLE, 1996, 1997, 1999, 2000, 2003
- "Internal Revenue Code Sections 303, 2207A, 6166 and 2032A," Administering the Taxable Estate Seminar, Minnesota CLE, 1995

SELECTED PUBLICATIONS

- *Minnesota Estate Administration Deskbook with eFormbook*, 6th Edition, 2024 Update, co-editor, Minnesota CLE, 2024
- "Opening an Estate, Inventory, and Disclaimers," co-author, *Minnesota Estate Administration Deskbook with eFormbook*, 6th Edition, 2024 Update, Minnesota CLE, 2024
- "Opening an Estate, Inventory, and Disclaimers," co-author, *Minnesota Estate Administration Deskbook, 6th Edition*, 2023
- *Minnesota Estate Administration Deskbook, 6th Edition*, co-editor, Minnesota CLE, 2023
- Quoted in *Before All Is Said and Done: Practical Advice on Living and Dying Well,* by Pat Miles, 2023
- "Breaking the Ice: Maslon board member adds to ‘mix of people,'" *Minnesota Lawyer*, 2022
- *Minnesota Estate Administration* 5th Edition, Editor-in Chief and Chapter Author, Minnesota CLE, 2017, with updates in 2018, 2019, 2020, and 2021
- "Planned Gifts– Legacy Makers," *Hennepin Lawyer*, Hennepin County Bar Association, March/April 2016
- *Minnesota Estate Administration* 4th Edition, Editor-in Chief and Chapter Author, Minnesota CLE, 2012, with updates in 2013, 2014, 2015, and 2016
- "Opening an Estate, Inventory and Disclaimers," chapter author, *Minnesota Estate Administration*, 4th Edition, Minnesota CLE, 2012
- *Minnesota Probate Deskbook*, co-author, Vol. 24, Minnesota Practice Series, West, 2004-2005, 2006, 2007, 2008-2009, 2009-2010, 2010-2011, 2011-2012
- "Opening an Estate, Inventory and Disclaimers," chapter author, *Minnesota Estate Administration*, 3d Edition, Minnesota CLE, 2007 and updates in 2008, 2009, 2010, 2011

- *Minnesota Estate Administration*, 3d Edition, Editor-in-Chief, Minnesota CLE, 2007 and updates in 2008, 2009, 2010, 2011
- "Managing Trusts," chapter author, *Creating a Trust: What You Need to Know*, Aspatore Books, 2008
- "Transferring Assets to the Next Generation: Strategies for Effective Estate Planning," chapter author, *Elder Law Trusts and Estates*, Aspatore Books, 2008
- *Minnesota Estate Administration*, 2d Edition, Minnesota CLE, 2006 update
- *Minnesota Estate Administration*, 2d Edition, Editor-in-Chief, Minnesota CLE, 2002
- "Opening an Estate," chapter author, *Minnesota Estate Administration*, 2d Edition, Minnesota CLE, 2002
- "Drafting QPRTs," 23rd Annual Probate and Trust Law Section Conference, Minnesota Continuing Legal Education, 1997
- "Historic Shipwreck Legislation: Rescuing the Titanic from the Law of the Sea," 13 *J. Legis.* 1982