



MATT D. MENTZER, CPA

SPECIAL COUNSEL

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PROFILE

Matt Mentzer is a CPA and attorney in the firm's Overland Park office, where he represents clients in trust, estate, and tax-planning matters as part of the Kansas City transactional practice group. Leveraging 15 years of combined accounting and legal experience, Matt frequently advises high-net-worth clients with taxable estates to develop and implement income and gift/estate tax minimization and mitigation strategies. He prepares estate plans and represents clients in all phases of probate and trust administration. Matt also serves as tax counsel on M&A transactions to incorporate tax planning throughout the matter, and represents clients before the US Tax Court, IRS Office of Appeals, and state taxing authorities on various tax issues and controversies.

Before joining Foulston, Matt's experience includes serving as lead tax attorney for a wealth management firm with more than \$200 billion in assets under management. He frequently collaborates with clients' wealth management, financial planning, and CPAs to implement tax strategies focused on achieving optimal results for clients. Matt was named to the *Missouri & Kansas Rising Stars* list in 2017 and 2018.

In Matt's free time, he enjoys playing pickleball, tennis, and coaching his children's sports teams. Matt is married with three children and resides in Overland Park.

Education

- University of Kansas (J.D., 2008)
- University of Kansas (B.S. in Business Administration and Accounting, emphasis in information systems, 2004)

Admissions

- Kansas (2008)
- Missouri (2010)
- U.S. Tax Court (2008)

PRACTICE AREAS

FOULSTON

ATTORNEYS AT LAW

- Estate Planning & Probate
- Elder Law
- Taxation
- Business & Corporate Law
- Mergers & Acquisitions

RELEVANT EXPERIENCE

- Represented clients ranging from C-suite officers of Fortune 500 companies to founders of start-up companies undergoing Series A and Series B funding with pre-money valuations between \$20-500 million.
- Advising clients with taxable estates on income and gift/estate tax planning strategies and implementation, including advise on trust decanting, merging, and change of situs.
- Served as tax counsel on M&A transactions for deals between \$5-\$100 million.
- Supervised and reviewed gift tax and estate tax returns for clients.

PREVIOUS LEGAL EXPERIENCE

Previous Legal Experience

- Creative Planning Legal, P.A., 2019-2023
- Lewis Rice LLC, 2013-2019
- Chapin Law Firm, LLC, 2009-2013
- Bever Dye, L.C., 2008-2009

PROFESSIONAL MEMBERSHIPS, AFFILIATIONS, AND HONORS

- Certified Public Accountant (CPA), Kansas, 2014-present
- Selected for inclusion in *Missouri & Kansas Rising Stars* list, 2017-2018, a Thomson Reuters business
- American Bar Association – Tax Section
- Kansas Bar Association
- The Missouri Bar
- Johnson County Bar Association
- Kansas City Metropolitan Bar Association

PUBLICATIONS

2023

FOULSTON

ATTORNEYS AT LAW

- Thought Leader Insights: Matt Mentzer
- Ingram's Magazine, Vol. 49, No. 12, Dec. 2023