



### Location

250 West Main Street  
Suite 1600  
Lexington, KY 40507

### Honors



*Woodward/White's The Best Lawyers in America*® 2013  
Lexington Trusts and Estates  
"Lawyer of the Year"

*Woodward/White's The Best Lawyers in America*® in the area of Trusts and Estates, 2009-2020

*Kentucky Super Lawyers*® in the area of Estate and Probate, 2007-2020

Highest Professional AV Rating by *Martindale-Hubbell Law Directory*

### Education

1979 - M.A., University of Chicago

1977 - J.D., University of Kentucky College of Law

1974 - B.A., *With Distinction*, University of Kentucky

### Admissions

Kentucky

# Walter R. Morris, Jr.

## Partner

P 859-288-7621 | F 859-259-0649

wmorris@wyattfirm.com

Walter Morris is a member of the Firm's Trusts, Estates and Personal Planning Service Team. Since 1982, he has been actively engaged in all areas of estate planning and administration. He has planned and administered estates of all sizes, from the simple to the complex. Mr. Morris is intimately familiar with the planning techniques currently in use including family limited partnerships, grantor retained annuity trusts (GRATs), Crummey trusts, planning with grantor (defective) trusts and sales to same, charitable split interest trusts and life insurance planning including irrevocable life insurance trusts and financing techniques for acquisition of insurance products.

### Publications

- *Chapter 14, Kentucky Estate Administration, Marital and Charitable Deductions and Administration of Estates*, University of Kentucky College of Law, Office of Continuing Legal Education, 2014.
- *Estate Planning for Retirement Benefits*, KBA Bench and Bar, November 2010.
- *The Kentucky Principal and Income Act: Kentucky Adopts a Modified Version of the Uniform Principal and Income Act*, KBA Bench and Bar, March 2005.
- *Chapter 9, Claims Against the Estate and Chapter 14, Marital and Charitable Deductions and Administration of Estates, Kentucky Estate Administration*, University of Kentucky College of Law, Office of Continuing Legal Education, 2008.

### Presentations

- Challenging Current Probate Issues in Modern Estate Administration, panel presentation, (UK Midwest/Midsouth Estate Planning Institute, July 2012)
- Probate and Trust Legislation Update (Updates from the Capitol: 2012 General Assembly Action, seminar sponsored by the Kentucky Legislative Research Commission, June 2012)
- Report from the Kentucky Probate and Trust Law Section Legislation Committee. Forthcoming Proposals to Improve Kentucky's Trust and Estate Laws (14th Annual Estate Planning Institute, Louis D. Brandeis School of Law at the University of Louisville, April 2011)
- Freeze Planning with GRATs and Sales to Grantor Trusts (10th Annual Estate Planning Institute, Louis D. Brandeis School of Law at the University of Louisville, April 2007)
- Selected Estate Planning and Drafting Issues after EGTRRA (9th Annual Estate Planning Institute, Louis D. Brandeis School of Law at the University of Louisville, April 2006)

### Professional Activities and Memberships

- American College of Trust and Estate Counsel, Fellow, State Law Committee
- Fayette County Bar Association, Chair, Probate Section, 1999 - 2000
- Chair, Probate and Trust Law Section of the Kentucky Bar Association, 2011-2012
- Chair, Legislation Committee, Probate and Trust Law Section, Kentucky Bar Association, 1998-2002; 2008-2012

### Civic Involvement

- Calvary Baptist Church, Finance Committee, 2007-2010; Deacon
- Lexington Opera Society, Board of Directors
- South Lexington Lions Club, Treasurer

## **Interests**

- Golf, Opera, Photography