HUSCH BLACKWELL



Josie M. Metzler

PARTNER

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OVERVIEW

Josie counsels families, businesses and tax-exempt organizations on a wide variety of tax plans.

Josie designs and implements individualized estate and succession plans to minimize income, gift, estate and generation-skipping transfer taxes. Applying her background in accounting, she offers sophisticated estate planning techniques such as irrevocable life insurance trusts (ILITs) and sales to intentionally defective irrevocable trusts (IDITs). Josie works with families and businesses of all sizes on customized core estate planning documents, such as:

- Wills and living wills
- Revocable and irrevocable trusts
- Financial and medical durable powers of attorney
- Healthcare declarations
- Qualified spousal trusts
- Life insurance trusts
- Gift, family and dynasty trusts
- Qualified personal residence trusts
- Discretionary trusts
- Asset protection trusts

Industry

Financial Services & Capital Markets

Services

Nonprofit Organizations & Religious Institutions

Private Wealth

Tax

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Josie also helps organizations throughout the country establish and maintain 501(c)(3) tax-exempt status, ranging from public charities for illness awareness to private foundations for professional athletes. She counsels nonprofits and board members on fiduciary duties and annual operations, such as the need to provide minutes and contribution receipts, and filing annual Internal Revenue Service (IRS) forms.

Josie devotes significant time to Husch Blackwell's pro bono efforts, representing indigent clients with estate planning needs and advising small nonprofits and charitable foundations on their formation and filing requirements.

Experience

WEALTH, TAX, TRUST, AND ESTATE PLANNING AND ADMINISTRATION/PROBATE

- Prepared deeds in all 50 states to fund trusts and/or entities for estate, tax and/or corporate planning purposes.
- Assisted clients with probate and trust administration.

BUSINESS/CORPORATE PLANNING

- Formed entities, including limited liability companies (LLCs), corporations and partnerships on behalf of clients.
- Helped clients devise effective and practical business succession plans.
- Prepared purchase and sale agreements for transactions between family members and trusts.

CHARITABLE PLANNING

- Guided clients in forming charitable organizations, including private foundations, private operating foundations and public charities.
- Counseled clients in obtaining 501(c)(3) tax-exempt status for charitable organizations.

SPECIAL NEEDS PLANNING

- Advised clients on use of special needs trusts.
- Prepared special needs trusts, testamentary special needs trusts, Medicaid payback trusts and other discretionary trusts.

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Recognition

- Missouri & Kansas Super Lawyers, Estate Planning & Probate, Rising Star, 2020

Education

- J.D., Wake Forest University School of Law
  - CALI Academic Excellence Award in Estate Planning
    CALI Academic Excellence Award in Taxation of Trusts & Estates
    Phi Alpha Delta Legal Fraternity
- M.S., University of Notre Dame
  - Accountancy
- B.S., University of Notre Dame
  - Accountancy

Admissions

- Missouri
- Illinois

Community Leadership

- Animal Protective Association, Planned Advisory Council

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2025 Pro Bono Contributor

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