



BASSFORD REMELE

Casey D. Marshall

SHAREHOLDER



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PRACTICE GROUPS

Class Action/Multidistrict Litigation
Commercial Litigation
Real Estate Litigation
Trust and Estates Litigation

INDUSTRY GROUPS

Financial Services
Technology

OVERVIEW

Mr. Marshall is a litigator who represents corporations and individuals in commercial disputes, and navigates families, businesses, and individuals through trust and estate conflicts.

Experienced in the litigation process, Mr. Marshall regularly represents clients in shareholder and securities disputes, as well as other business-related claims, in multiple jurisdictions. He represents clients in probate, state, federal, and appellate courts, recently helping resolve multiple proceedings initiated by beneficiaries of trusts and disputes between shareholders in closely-held corporations.

Mr. Marshall is active in the trust and probate section and the business law section of the Minnesota State Bar Association. He graduated *magna cum laude* from the University of Minnesota Law School.

EDUCATION & ADMISSIONS

Education

University of Minnesota Law School, J.D., *magna cum laude*, 2013

- Dean's Distinguished Scholarship
 - Dean's List, 2011, 2012, 2013
 - Practice and Professionalism, honors
 - *Minnesota Journal of International Law*, staff member
- Concordia College, B.A., 2000

Bar Admissions

- U.S. Court of Appeals, Eighth Circuit
- U.S. District Court, District of Minnesota
- U.S. District Court, District of North Dakota
- Minnesota
- North Dakota
- South Dakota
- Wisconsin

EXPERIENCE

Representative Cases

- Part of team who successfully defended against fraud in the inducement claims in connection with a commercial real estate transaction.
- Part of trial and appellate team who successfully defended against minority shareholder claims.

Additional Representative Cases

- Successfully defended majority shareholders of a closely-held, family-owned corporation, in a shareholder suit brought by a minority shareholder.
- Successfully represented trust beneficiary in a suit to remove existing trustee and appoint a new corporate trustee.
- Obtained favorable buyout and resolution of dispute on behalf of minority shareholder in a local technology company.
- Successfully defended corporate trustee in suit by beneficiaries to remove the trustee and seeking monetary damages.

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Publications

- *Notes & Trends – Probate and Trust Law*, monthly column author, Bench & Bar of Minnesota, 2017-2023
- Four Things Closely Held Shareholders Should Know, author, Upsize, September 2022
- *50-State Damages Fiduciary Remedy and Damages Survey*, contributing author, ACTEC Fiduciary Litigation Committee, March 2018
- *The Close Corporation Privilege Trap: The Troubled Legacy of Evans v. Blesi and the Minnesota Courts*, co-author with A.V. Desteian, Bench & Bar of Minnesota, November 2015
- *A Threat From Within: Defending Closely-Held Corporations Against Their Own Shareholders*, author, Minnesota Defense, Winter 2015

Seminars

- *Trustee Removals and Trust Modifications*, co-presenter with Amy Morris Hess, A Loss of Trust: What Trust and Estate Litigators Think Estate Planners Need to Know, Bassford Remele, January 24, 2023
- *Mom Always Liked You Best – Trust and Estate Litigation and the New Minnesota UTC*, co-presenter, private bank, October 6, 2022
- *Evidentiary Issues Unique to Trusts and Estates Litigation*, presenter, Probate and Trust Law Section Conference, Minnesota Continuing Legal Education, June 13, 2022
- *The Legal and Ethical Implications of the Close Corporation Attorney-Client Privilege Trap*, presenter, Business Law Institute, Minnesota Continuing Legal Education, May 9, 2022
- *Defending Trustees and Personal Representatives in Trust and Estates Disputes*, presenter, Professional Liability Defense Federation, Nashville, Tenn., October 7, 2021
- *Roundtable Discussion – Applying Remedy and Damage Analysis to 4 Different Types of Disputes (Shareholder Disputes)*, presenter, Remedies and Damages in Commercial Litigation, Minnesota Continuing Legal Education, July 30, 2021
- *Current Trends in How to Approach Discovery and Motions*, presenter, Litigating Probate and Trust Disputes in 2021 – A Brave New World, Minnesota Continuing Legal Education, March 18, 2021
- *Ethics: Who Do I Represent? The Close Corporation Attorney-Client Privilege Trap, Shareholder Disputes in Closely-Held Businesses*, presenter, Minnesota Continuing Legal Education, January 25, 2021
- *The Estate Planner's Guide to Responding to a Subpoena for a Client File and Deposition*, presenter, Minnesota State Bar Association, March 5, 2020
- *Estate Planning, Probate & Trust Law 50*, presenter, Minnesota Continuing Legal Education, February 21, 2020
- *Trust and Estate Litigation: What Trust and Estate Litigators Think Non-Litigators Need to Know*, presenter, Bassford Remele Trust and Estates Litigation Seminar, February 11, 2020
- *Trust & Estate Risks and Pitfalls for Attorneys*, co-presenter with S.M. Sitek, Minnesota Lawyers Mutual, July 2019

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- *Mom Always Liked You Best – Trust and Estate Litigation and the New Minnesota UTC*, co-presenter with A.I. Silver and N.M. Abramson, Trust Point, July 2018
- *Legal Update: Payment of Fiduciary Attorneys’ Fees*, co-presenter with N.M. Abramson and S.M. Sitek, Minnesota Lawyers Mutual, May 2018
- *Trust and Estate Litigation*, co-presenter with S.M. Sitek, Minnesota Lawyers Mutual, July 2017
- *Deciphering, Determining and Decanting: Sputtering Our Way Into The Year of the New Minnesota UTC*, co-presenter, Dakota County Law Library, April 2016
- *Trust and Estate Litigation: What Trust and Estate Litigators Think Non-Litigators Need to Know*, co-presenter with A.I. Silver, Twin Cities Financial and Estate Planning Councils, March 2016
- *Litigating Under Minnesota’s Uniform Trust Code*, co-presenter with A.I. Silver, U.S. Bank, January 2016
- *Settling Trust and Estate Disputes Without Litigation*, co-presenter with S.M. Sitek, National Business Institute, January 2016
- *Minnesota’s New Uniform Trust Code*, faculty, Minnesota CLE, November 2015
- *Mom Always Liked You Best – Trust and Estate Litigation and the New Minnesota UTC*, co-presenter with A.I. Silver and S.M. Sitek, Bremer Wealth Management, November 2015
- *Litigating Under Minnesota’s Uniform Trust Code*, faculty, Minnesota Continuing Legal Education, October 2015

PROFESSIONAL & CIVIC

Bar Associations

- Minnesota State Bar Association
 - Trust and Probate Section
 - Litigation Committee
 - Probate Forms Committee
 - Business Law Section
 - Membership Committee
- State Bar of North Dakota
- State Bar of Wisconsin
- Hennepin County Bar Association

Professional Associations

- Minnesota Defense Lawyers Association
- Twin Cities Estate Planning Council
- Sioux Falls Estate Planning Council
- Twin Cities Exit Planning Institute

Civic Involvement

- Volunteer Lawyers Network, 2013-2018

ACCOLADES

Honors & Awards

- Best Lawyers: Ones to Watch, Commercial Litigation, Trusts and Estates Litigation, and Mass Tort Litigation/Class Actions, 2022-present
- Minnesota Rising Stars List, *Super Lawyers*, 2016-present