

SERVICE

# Trusts & Estates



## ATTORNEYS

Stewart F. Grossman  
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## ESTATE PLANNING & ADMINISTRATION.

The attorneys in our Trusts and Estates practice group work closely with individuals and families on a wide range of estate planning and estate and trust administration matters.

We are well-versed in the design and implementation of sophisticated estate plans carefully tailored to clients' unique assets and their personal, family, and philanthropic goals, with an eye to minimizing taxes, protecting wealth, and providing peace of mind that their affairs are in order.

We regularly prepare wills, durable powers of attorney, health care proxies, revocable trusts, and irrevocable trusts such as Qualified Personal Residence Trusts ("QPRTs"), Irrevocable Life Insurance Trusts ("ILITs"), and Grantor Retained Annuity Trusts ("GRATs"). In addition, we regularly counsel clients on lifetime gifts, on structuring ownership in family businesses, on transferring wealth to the next generation in a tax efficient manner, and on charitable giving techniques such as charitable trusts, private foundations, and donor advised funds.

We also handle estates and trusts of all sizes, and are experienced in every aspect of administration, including Probate Court filings, preparation of federal and state estate tax returns, and representation before the IRS and the Massachusetts Department of Revenue.

## EXPERIENCE

- Set up an irrevocable trust to hold over \$20 million of life insurance used to purchase the stock of a famous Boston restaurant after the owner's death, thereby transferring ownership to the children and providing liquidity to the owner's estate and wife.
- Helped structure the sale of over \$7 million of Chinese porcelains in Hong Kong, in connection with the administration of an estate.

- Drafted a charitable remainder unitrust leaving \$1 million to the Museum of Fine Arts.
- Successfully petitioned the Probate Court to terminate an irrevocable trust, giving the life tenants and charities the actuarial value of their interests.