riw.com

Trusts & Estates

OUR APPROACH

Client-Centered Strategy

Our attorneys are known for formulating creative, practical solutions to complex estate and business succession planning issues that achieve our clients' personal, and estate and tax minimization planning objectives. We have strong relationships with our clients, and develop a highly customized solution for each client's unique situation. We also work collaboratively with our clients' other advisors to obtain efficient and cost-effective planning results in a holistic fashion.

Protecting your wealth and planning for the future requires more than a set of documents. It demands a strategy that reflects your family, your business, and your goals. At RIW, our Boston trust and estate attorneys deliver clear, practical, and proactive counsel to help clients manage and transfer their wealth with confidence.

Team

Whether you're preparing for retirement, managing a family business, or planning for the next generation, our team helps simplify the process while avoiding unnecessary tax burdens or disputes.

We work closely with your other trusted advisors, financial planners, accountants, and family office professionals to build tax-efficient, well-coordinated plans. And when the situation is complex, such as dealing with closely held business interests or multigenerational family structures, we bring the experience you need to move forward.

At every step, you can expect a steady hand, straightforward advice, and estate planning that adapts as your life and the law change.

Contact

When was the last time you reviewed your estate plan? Let us show you how to better achieve your family's inheritance and tax planning goals. For more information, contact **Liane Keister**, Trusts and Estates Group Chair, at **(617) 570-3517** or **lmk@riw.com**.

SERVICES

We provide comprehensive estate and wealth planning services to individuals, families, and business owners. From strategic planning to hands-on administration, we help you protect

CONTACT

Liane M. Keister

(617) 570-3517

Send Email

PROFESSIONALS

Liane M. Keister

Eduina Selmanhaskaj

your assets, minimize taxes, and ensure your wishes are honored.

Estate Planning

We design and implement estate plans that reflect each client's goals, family structure, and asset mix. Our legal services include the preparation of:

- Wills and revocable and irrevocable trusts
- Durable powers of attorney and health care directives
- Planning for blended families and multigenerational households
- Charitable giving strategies and legacy planning
- Estate planning for clients with significant business or real estate interests

As experienced Trusts, Wills & Estates Attorneys, we translate complex issues into clear options and help you make informed decisions every step of the way.

Tax Planning

Effective estate planning requires careful attention to federal and Massachusetts tax considerations. Our attorneys advise clients on strategies designed to reduce estate, gift, and income tax exposure while supporting long-term planning objectives.

We regularly counsel clients on:

- Lifetime gifting strategies
- Marital and credit shelter trust planning
- Planning around Massachusetts estate tax thresholds
- Trust structures intended to support long-term tax efficiency

Our work is closely coordinated with RIW's **Tax Practice** and **Banking, Finance & Lending Group** to ensure consistency across all aspects of a client's financial picture.

Business Succession Planning

For owners of closely held businesses and family enterprises, succession planning is often one of the most critical and sensitive parts of an estate plan. We work with business owners to develop strategies that support continuity, protect value, and address both family and operational concerns.

Our services include:

- Ownership transfer planning
- Governance and control structures
- Buy-sell and shareholder arrangements
- Coordination of estate plans with business continuity goals

By collaborating with RIW's **Corporate & Business attorneys**, we help ensure that estate and business planning proceed in tandem.

Estate and Trust Administration

We assist personal representatives, trustees, and beneficiaries with the efficient administration of estates and trusts. Our team provides guidance throughout the administration process, including:

- Probate and estate settlement
- Trust administration and ongoing compliance
- Fiduciary guidance and accountings

- Distribution planning and tax-related matters

We also represent individual and institutional fiduciaries who require ongoing legal support in fulfilling their duties.

Elder Law and Long-Term Planning

Planning for aging and long-term care is an important component of many estate plans. Our attorneys advise clients and families on strategies designed to protect assets while addressing care needs and future decision-making.

Our services include:

- Long-term care and asset protection planning
- Irrevocable trust planning
- Guardianship and conservatorship matters, when appropriate
- Planning for incapacity and changing care needs