goulston&storrs

J. Robert Casey

Of Counsel

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Bob Casey is a trusts and estates attorney who handles the full range of estate planning and trust administration work, advising on tax and non-tax considerations pertaining to the ownership, management and transfer of wealth.

In Bob's broad-based practice, he prepares wills, trusts and related documents for both United States and multinational clients.

He also acts as counsel to estates in both probate court and estate tax settlement proceedings, advising them on protection of assets and tax planning matters (including charitable gift planning), as well as negotiating and drafting prenuptial agreements, and helping clients with all kinds of personal, family and tax matters. Bob also participates as a trustee in the management of investments in numerous client trusts.

Accolades

- Martindale Hubbell Peer Review Rated AV Preeminent ™

Affiliations

- Board of Directors of The Alliance for Children, Inc.
- The Childrens Welfare Foundation
- All Newton Music School
- Boston Bar Association, Estate Planning Section
- United States Tax Court Bar

Admissions

- Massachusetts

Education

- Suffolk University Law School (J.D., 1968)
- Boston University School of Law (LL.M., 1974)
- College of the Holy Cross (B.S., 1965)

Representative Matters

Wealth Transfer Planning
Long-term representation of clients in ongoing and continuous wealth transfer planning.

Creation of LLCs and FLPs for Real Estate Interests, Other Assets and Gifts
Creating limited liability companies ("LLC") and family limited partnerships ("FLP") funded with family real estate interests or other assets, and implementation of gifts of LLC and FLP interests to trusts for benefit of family members.

Life Insurance Trusts and Other Irrevocable Trusts
Creation and administration of life insurance trusts and other irrevocable trusts for wealth transfer purposes.

Asset Protection and Income Tax Planning
Creative asset protection and income tax planning involving irrevocable grantor trusts.

Trusts and Charitable Gift Annuity Agreements for Tax-Exempt Donee Organizations
Preparing charitable remainder trusts, charitable lead trusts and charitable gift annuity agreements for donors and on behalf of tax-exempt donee organizations.

Revocable and Irrevocable Trust Arrangements
Drafting and implementing revocable and irrevocable trust arrangements to take advantage of income and wealth transfer planning opportunities. Advising on the selection of trustees and implementing appropriate trustee succession arrangements.

Charitable Giving and Entity Structure
Advising families on charitable giving and entity structure to minimize income and wealth transfer taxes.

Fiduciary Duties and Tax Laws in the Administration of Estates and Trusts
Advising professional and family executors and trustees in understanding fiduciary duties and tax laws in connection with the administration of estates and trusts.