goulston&storrs

Kerry L. Spindler

Director

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Kerry Spindler is an estate and tax planning lawyer, helping individuals and families to maneuver through sophisticated tax and charitable planning issues. She handles all aspects of estate planning, estate administration, and trust administration. She also serves as Co-Chair of the firm's Private Client & Trust Group.

Kerry is skilled at advising clients, including non-traditional families and same sex partners and spouses, on matters related to succession planning and wealth transfer. She advises her clients with respect to minimizing transfer taxes, probate avoidance, the creation of charitable legacies through private foundations and other means, and administering probate estates and trusts. She similarly counsels beneficiaries, and trustees and other fiduciaries.

Kerry also has significant experience in counseling nonprofit organizations and advises nonprofit entities in connection with corporate formation and application for tax-exempt status.

Prior to joining the firm, Kerry worked as a judicial intern for Associate Justice Herman J. Smith, Jr., Middlesex Superior Court. She also worked as a judicial intern to Federal Magistrate Judge Marian Payson.

Prior to attending law school, Kerry worked for more than a decade in philanthropy and the non-profit cultural sector. She spent much of that time as an Arts & Culture Program Officer at The Heinz Endowments, where she operated within a three-person team to distribute more than $65 million in grants annually. During that period, she specialized in special project grant making to small- and mid-sized arts organizations, facilitating general operating support grants to large arts organizations, grants for arts-based community and afterschool programs, and grants for support of individual artists.

Accolades

- Boston University Public Interest Law Journal
- 40 Under 40, Pittsburgh, Pennsylvania, 2001
- *Best Lawyers in America*® (2023-2025): Trust and Estates

- Chambers High Net Worth (Band 1 Firm Ranking), 2017-2020
- Selected as a 2021 *Leadership Council on Legal Diversity Fellows Program*

Affiliations

- Chartered Advisor in Philanthropy® (CAP®)
- Boston Bar Association
    - Trusts & Estates Section Steering Committee Co-Chair, 2019-2021
    - Boston Bar Journal Board of Editors, 2017-2018
    - Trusts & Estates Section Steering Committee, 2011-2016
    - Estate Planning Committee, Co-Chair, 2014-2016
    - Public Service Committee, Co-Chair, 2012-2013
    - Trusts & Estates Section, New Developments Committee, 2010-2011
    - Trusts & Estates Section, Communications Committee Co-Chair, 2010-2011
- Uniform Fiduciary Access to Digital Assets Working Group, Committee Member, 2014
- Uniform Rules on Public Access to Court Records Working Group, Committee Member, 2016

Admissions

- Massachusetts

Education

- Boston University School of Law (J.D., 2008)
- Carnegie Mellon University (M.A.M., *summa cum laude*)
- Rochester Institute of Technology (B.S., *summa cum laude*)

Representative Matters

Creating Estate Plans for Individuals and Families

Creating estate plans for purposes of succession planning, tax planning, and avoidance of probate, including plans for non-traditional families, same-sex partners and same-sex spouses.

Revocable and Irrevocable Trust Arrangements

Drafting and implementing revocable and irrevocable trust agreements including life insurance trusts, GRATs, QPRTs, and other gifting trusts to take advantage of income and wealth transfer planning opportunities. Advising on the selection of trustees and implementing appropriate trustee succession arrangements.

Charitable Planning
Advising clients on all aspects of charitable planning while working with client advisors including philanthropic advisers, financial planners, and accountants.

Administration of Family Trusts
Serving as professional trustee of marital trusts, family trusts, generation-skipping trusts and other sophisticated arrangements which routinely require working with individuals across generations of families.

Advising Professional and Family Executors and Trustees
Advising professional and family executors and trustees in understanding responsibilities, fiduciary duties and tax laws in connection with the administration of estates and trusts.

Gift and Estate Tax Returns
Preparation of gift and estate tax returns.

Family Foundations
Creation of family foundations and guidance to the clients involved regarding the implementation of family grant-making programs.

Gift Agreements Between Donors and Non-Profits
Negotiating and creating gift agreements between donors and non-profit entities.

Family Limited Liability Companies
Creation of family limited liability companies to facilitate estate planning and business succession goals.