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
- Chambers High Net Worth (Band 1 Firm Ranking), 2017-2020

- Selected as a 2021 *Leadership Council on Legal Diversity Fellows Program*
- *Best Lawyers in America®* (2023-2024): Trust and Estates

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-Present
- 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 Families, Same-Sex Partners and Same-Sex Spouses

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.

Life Insurance Trusts and Other Irrevocable Trusts

Creation and administration of life insurance trusts and other irrevocable trusts for wealth transfer purposes.

Gift and Estate Tax Returns

Preparation of gift and estate tax returns.

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

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

Charitable Planning
Advises clients on all aspects of charitable planning while working with firm professionals including philanthropic advisers, financial planners, and accountants.

Administration of A Range of Family Trusts
Involved in the active administration of marital trusts, family trusts, generation-skipping trusts and other sophisticated arrangements which routinely require working with individuals of second and third generations of families

Family Foundations
Creation of family foundations and guidance to the clients involved regarding the formulation and implementation of family grant-making programs for charitable giving purposes.

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.

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

Provincetown Commons: A Home for Creativity and Innovation
Representation of Provincetown Commons, Inc., in connection with corporate formation, governance, obtaining tax exempt status, lease/contract review and negotiation, and obtaining local permits and approvals.

Provincetown Commons is renovating, adapting and programming a nearly century-old community center located in the heart of Provincetown, MA, for use by the local community. The revitalized community center will provide year-round working space and professional support to area artists, other members of the local creative economy, and start-up businesses, and will serve as a gathering space for educational and community initiatives, as well as for the Outer Cape Cod community at large. Aiming to contribute to strengthening Provincetown's year-round economy, the Provincetown Commons will serve as a nexus for creativity, collaboration, and new economic opportunity.

As general counsel to Provincetown Commons, Goulston & Storrs attorneys created formation documents, registered the corporation with the Secretary of the Commonwealth and Massachusetts Attorney General, and obtained 501(c)(3) tax exempt status from the IRS. We worked closely with Provincetown Commons on all aspects of the re-development process, including negotiation of the lease and related documents with the Town of Provincetown, obtaining local permits and approvals and negotiating the construction contract with the contractor. Provincetown Commons had its grand opening in late 2018, and we continue to provide legal support and counsel to the transformative community center.

Provincetown Commons pre-renovation

Provincetown Commons post-renovation

Photos courtesy of Provincetown Commons