goulston&storrs

# Private Client & Trust

For generations, Goulston & Storrs has represented individuals and families on all matters pertaining to the ownership and transfer of wealth. The Private Client & Trust Group at Goulston & Storrs is one of the largest and most well-established practices in New England. We follow a multi-disciplinary approach that brings to bear the business, real estate, tax, and other expertise of attorneys throughout the firm.

**Our Expertise & Services**

Our Private Client & Trust Group has been at the forefront in developing and implementing sophisticated tax-sensitive planning techniques, which integrate with an individual's or family's financial, charitable, risk management, and personal objectives.

We offer a full range of legal services relating to estate and trust administration, we serve as professional fiduciaries, and provide a comprehensive platform of family office services. We work collaboratively with the client's financial, accounting and insurance advisors.

Our service areas include:

- Estate Planning & Administration
- Charitable Planning
- Trust Investment & Administration Services

For further information about the Goulston & Storrs Private Client & Trust Group, please contact one of our group Co-Chairs, Michelle Porter or Andy Rothstein.

## Publications

December 7, 2018
**Podcast - Listen to Opportunity Zones: The Biggest Community Development Opportunity**
CUNY TV's The Stoler Report

December 4, 2018
**A Legacy Plan That Fulfills Your Vision**
Crain's New York

October 26, 2018
**New IRS Regulations Issued: What's Next for Opportunity Zones?**

August 16, 2018
**Health Care and Financial Protections for Your College Student**

December 29, 2017
**Tax Reform Advisory: Exempt Organizations**

December 21, 2017
**Private Client & Trust Tax Reform Advisory**

November 21, 2016
**Charitable Giving Before Tax Law Changes Under the New Administration**

September 29, 2016
**Drafting Irrevocable Trusts in Massachusetts, MCLE**

August 25, 2016
**Proposed Rules Would Limit Valuation Discounts for Family Controlled Entities**

August 10, 2016
**T&E Litigation Newsletter- 8/10/16**

August 1, 2016
**Chapter 1 - Estate and Gift Tax Issues Relating to Irrevocable Trusts. In Drafting Irrevocable Trusts in Massachusetts, MCLE New England**

July 13, 2016
**T&E Litigation Newsletter- 7/13/16**

July 5, 2016
**T&E Litigation Newsletter- 7/5/16**

May 25, 2016
**T&E Litigation Newsletter- 5/25/16**

April 27, 2016
**T&E Litigation Newsletter- 4/27/16**

March 30, 2016
**New Basis Reporting Requirements for Executors and Beneficiaries**

January 5, 2016
**T&E Litigation Newsletter- 1/5/16**