

## 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](#)
- [Fiduciary & Family Office Services](#)
- [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, [Andy Rothstein](#) or [Kerry Spindler](#).

## Representative Matters

### **Asset Protection Planning**

Advises clients with respect to protecting their assets from the reach of unknown creditors.

### **Estate Planning**

Design and implementation of sophisticated and tax-efficient estate plans, including trusts, wills, and incapacity documents, that reflect clients' wishes.

### **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

### **Gift Agreements Between Donors and Non-Profits**

Negotiating and creating gift agreements between donors and non-profit entities.