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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, Michelle Porter or Andy Rothstein.

Publications

September 2, 2020

Probate & Fiduciary Litigation Newsletter - September 2020

August 3, 2020

IRS Adjusts Distribution Guidance: Taxpayers Who Took Required Minimum Distributions in 2020 May Be Able to Return Them to a Retirement Account

July 22, 2020

Massachusetts Court Enforces No-Contest Clause Against Trust Beneficiary

Wealth Management

April 27, 2020

Relief for Some Non-Resident Aliens Stranded in the U.S. Due to the Coronavirus Outbreak

April 16, 2020
Your Child's Health Care and Financial Decisions: Are You Prepared?

April 8, 2020
Estate Planning Opportunities in the Current Environment

April 2, 2020
Low Interest Rates and Asset Values Create Unique Opportunity for Gift Planning

March 30, 2020
No, Insurance is Not the Solution to the Problem

February 7, 2020
Probate & Fiduciary Litigation Newsletter: February 2020

December 30, 2019
The SECURE Act: Major Changes Coming to Retirement Accounts in 2020

March 2020
Digital Assets: Are You Prepared to Protect Them?
Starting the Conversation: Discussing Family Wealth and Values with Children

October 28, 2019
IRS: Valuation of Publicly Traded Stock Must Consider Anticipated Merger
Boston Bar Association - Trust & Estates Section

October 15, 2019
Probate & Fiduciary Litigation Newsletter - October 2019

August 28, 2019
Health Care, Financial, and Educational Records Protections for Your College Student

August 28, 2019
Probate & Fiduciary Litigation Newsletter - August 2019

June 27, 2019
Probate & Fiduciary Litigation Newsletter - June 2019

May 2019
For Law Firms, Newly Wealthy Startup Clients Bring in Big Business
The American Lawyer

May 20, 2019
Probate & Fiduciary Litigation Newsletter - May 2019

April 23, 2019
Probate & Fiduciary Litigation Newsletter - April 2019

February 2019
Probate and Fiduciary Litigation Newsletter - February 19, 2019

December 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

November 15, 2018
Appeals Court Ruling Highlights Risks of Pre-Printed Forms
Massachusetts Lawyers Weekly

November 2018
New York's Article 77: A Useful Tool for Expediting Trust Litigation

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

October 2018
Probate and Fiduciary Litigation Newsletter - October 1, 2018

August 2018
Probate and Fiduciary Litigation Newsletter August 27, 2018

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

July 2018
Probate and Fiduciary Litigation Newsletter July 10, 2018

December 2017
Tax Reform Advisory: Exempt Organizations

December 2017
Private Client & Trust Tax Reform Advisory

November 2017
Probate and Fiduciary Litigation Newsletter November 21, 2017

August 2017
Probate and Fiduciary Litigation Newsletter August 31, 2017

June 2017
Probate and Fiduciary Litigation Newsletter June 28, 2017

March 2017
Probate and Fiduciary Litigation Newsletter March 20, 2017

February 2017
Probate and Fiduciary Litigation Newsletter February, 2017

December 2016
Probate and Fiduciary Litigation Newsletter December 16, 2016

November 2016
Probate and Fiduciary Litigation Newsletter November 30, 2016

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

November 2016
T&E Litigation Newsletter- 11/14/16

September 2016
Drafting Irrevocable Trusts in Massachusetts, MCLE

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

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

August 2016, 2013
Chapter 1 - Estate and Gift Tax Issues Relating to Irrevocable Trusts. In Drafting Irrevocable Trusts in Massachusetts, MCLE New England

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

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

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

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

March 2016

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New Basis Reporting Requirements for Executors and Beneficiaries

January 2016

T&E Litigation Newsletter- 1/5/16