Chambers
High Net Worth
2020

Leading HNW Professionals worldwide

USA Massachusetts

How lawyers are ranked

Every year we carry out thousands of in-depth interviews with clients in order to assess the reputations and expertise of business lawyers worldwide. The qualities we look for (and which determine rankings) include technical legal ability, professional conduct, client service, commercial awareness/astuteness, diligence, commitment, and other qualities most valued by the client.

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Private Wealth Law

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Ropes & Gray LLP *
Band 2
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Nixon Peabody LLP
Nutter McClennen & Fish LLP
Band 3
Hemenway & Barnes LLP
Lourie & Cutler
Megan & O'Shea
* *Indicates firm with profile.*
◊ *(ORL) = Other Ranked Lawyer.*
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Private Wealth Law – Massachusetts – Senior Statespeople	
Senior Statespeople: distinguished partners	
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Band 1	**Band 3**
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Hall Martin *Ropes & Gray LLP*	Monnich Brian *Choate Hall & Stewart LLP*
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Sloan David Scott *Holland & Knight LLP*	**Band 4**
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Bedingfield Brad *Hemenway & Barnes LLP*	Brown Peter R *Nutter McClennen & Fish LLP*
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Band 1

Choate Hall & Stewart LLP

Choate is a long-established, blue-chip Bostonian firm with a top-tier reputation across New England. One interviewee describes it as *"an exceptional group"* and a *"high-end shop"* in Boston. Another says it is *"a strong firm in this city,"* and reports that *"we have a tremendous amount of respect for the team there."*

Choate is also highlighted for its commitment to private client work. *"The trust and estate planning practice is a priority at Choate, which is not the case at some of the other large firms in Boston,"* says a local client, adding: *"This makes a big difference in relationships. Matters get handled quickly and efficiently."*

Notable practitioners

Interviewees say **Silvana Giner** is *"very well respected in Boston"* and an *"incredibly good"* trusts and estates practitioner. One source reports that *"she is devoted to her clients, creative in her problem solving, and she is personable and down-to-earth."* Giner is highly experienced in wealth transfer matters and often acts as trustee for wealthy families. Another interviewee says she is *"an excellent lawyer – she has very good technical skills, and she is able to juggle a tremendous amount of responsibility and do it well."*

Brian Monnich is the firm's practice group leader for wealth management and is considered to be a particular expert on international tax and estate planning matters. One interviewee says: *"Brian has been in this field for 20 years and is very good. I would recommend him without hesitation."* Another reports that *"he is considered to be committed to his practice and knowledgeable in the field of private equity and entrepreneurs – he is excellent."*

Long-standing estate planning partner **William Lowell** often acts as a trustee on large family trust structures for ultra-wealthy clients. He is also noted for his expertise in trusts matters and advising non-profit organisations, including charitable foundations.

Day Pitney LLP

Day Pitney has an *"outstanding"* reputation for high-end trusts and estate work in this market. One source reports being *"very impressed with how matters are handled in a methodical and timely manner,"* and says that *"the team continuously goes above and beyond to keep all matters a priority and get things*

Private Wealth Disputes
Massachusetts
Leading Individuals
Band 1
Hirsch Jillian *Hirsch Law (ORL)* ◊
Swirbalus Mark *Goulston & Storrs*
Band 2
Jalkut Thomas P *Nutter McClennen & Fish LLP*
◊ *(ORL) = Other Ranked Lawyer.*
Alphabetical within each band. Band 1 is highest.

completed quickly and precisely." Another interviewee adds: *"Through my experience with other firms, I have not found the personalisation that Day Pitney has with their clients. I feel that the entire team takes the time to truly learn needs and finds capable ways of solving problems."*

A third source praises the team's collaborative approach to complex trusts and estates matters, saying: *"I am impressed by how they work as a team, internally with other Day Pitney attorneys and with other professionals such as financial advisers, CPAs and other attorneys. They think about what is the best team to serve a client and work co-operatively and concertedly to bring the best result for the client. They make it easy to do business with them."*

Notable practitioners

Barbara Freedman Wand is said to have *"good international experience"* and to do *"excellent work"* in the trusts and estate planning practice area. Freedman Wand has particular expertise in charitable planning and representation of non-profit organisations. She is *"definitely respected in Massachusetts,"* says a source, who adds: *"Her clients love her and she is very dedicated to them."* One such client says: *"I couldn't ask for more for a wills, trusts and estates attorney. She is a consummate professional and at the same time is extremely sympathetic to delicate family issues. She's always there for us."*

Leiha Macauley is one of the most highly regarded trusts practitioners in New England. *"Her client relations skills are impressive,"* says one interviewee, adding: *"She makes everything positive, even when there are difficult things. She comes across as humble and caring – you leave meetings and everyone feels good."* Another source praises Macauley's ability to *"explain things to my clients in a way they can understand,"* as well as her *"very good rapport with clients,"* explaining that *"she is very good at communicating, and she brings a really good, positive energy to every project – she always has a smile on her face and is looking for the positives. Everybody always feels good when working with her."* A fellow private client attorney says: *"If I had to send a piece of work to anybody, it would be her; she is the best practitioner I have seen."*

Stephen Ziobrowski is regarded as a top technical practitioner and a *"treasured resource in Boston"* for complex tax and wealth structuring questions. *"Steve Ziobrowski always impresses me with his blend of tax knowledge, tax experience and practicality,"* says a local investment adviser, adding: *"His advice is always well considered and clear."* Another wealth manager describes Ziobrowski as *"the technical guru"* in the Day Pitney private client team, and reports that *"he makes everyone around him better"* on these matters. Ziobrowski also wins praise for his ability to communicate these difficult issues to clients. *"Stephen has a unique ability to enhance any client's understanding of the very analytical, paperwork-heavy process"* of estate planning, says a third source, who adds: *"Through his descriptive storytelling and experiences, he is able to break things down to a very basic level of understanding. You know exactly what Stephen is doing and why."*

A Boston-based wealth adviser says **David Silvian** is *"a very good lawyer – he is very detail-oriented and thoughtful, and he is on top of the current laws and how to navigate this area. He is very analytical and intellectual on the legal side."* Silvian advises ultra-wealthy families on estate planning, planned charitable giving and gift and estate tax matters, among other issues.

Goulston & Storrs

Goulston & Storrs is highly rated for trusts and estate work. *"They have some great lawyers and clients and they're very focused on the real estate market,"* comments one interviewee, while another says: *"I like them a lot – they have a lot of high-end real estate clients."*

Notable practitioners

Mark Christopher is described as *"somebody that people enjoy working with,"* and as someone who *"gives great advice."* A fellow estate planning attorney says: *"He is very good – he is collaborative, he goes in depth into the tax code, and he presents in a way you can understand."* Another source says Christopher is *"a fearless advocate for his client,"* reporting that, on a recent matter, *"he was always professional, he rolled up his sleeves and would not let go till he got out every little bit for his client – he is incredibly smart and committed to his clients."*

One attorney says they consider **Mark Swirbalus** to be *"an outstanding probate litigator,"* adding: *"He is the best litigator in town; he is so good at what he does."* Boston-based litigator Swirbalus is often called on by trusts and estate planning lawyers in the city for assistance with contentious matters. *"He is great at what he does and we use him often,"* says one interviewee, while another comments: *"He is a great probate litigator and he does a great job,"* adding that *"he is very responsive and he knows the ins and outs for probate court matters."*

Suma Nair advises high net worth clients on tax and estate planning matters, wealth transfer, business succession and planned charitable giving. One of Nair's peers says: *"I go to her with my complicated problems. She is scarily smart, personable and tirelessly committed to her client."* Nair is also described as being *"very smart and very hard-working,"* and *"co-operative, pragmatic and technically proficient."*

Mark Balk handles trusts matters, estate planning and private client tax work. He is a well-regarded senior private client attorney in Boston and is said to work with some impressively wealthy client families.

Holland & Knight LLP

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Holland & Knight is one of the relatively few large law firms in the US to have a truly national trusts, estates and private client practice, and the firm's private wealth services group has a deep bench of attorneys in the Boston office. The lawyers often advise ultra-wealthy clients on domestic and international wealth planning and transfer issues, cross-border tax planning and related matters.

One interviewee praises the firm for its *"attention to detail,"* and describes it as *"focused, client-centric, with good partners, diverse and with an excellent national network."* The firm is also said to be *"uniquely situated to handle complex litigation involving trusts and estates"* in Massachusetts. A source says: *"Holland & Knight would be my recommendation for anyone looking to update or develop a long-range estate plan and know you not only have highly competent counsel but also lifelong partners that are able to also provide appropriate counsel to family members long after your passing."*

Notable practitioners

Shari Levitan leads the private wealth services department in the New England region. She handles non-contentious estate planning and wealth transfer matters as well as trusts and estate disputes work. One source praises her *"great bedside manner"* with clients, and says she has *"great attention to detail"* on these matters. *"She is amazing,"* enthuses another interviewee, adding: *"She is my go-to person with respect to international work, and she is willing to talk and work through any questions I have."*

David Scott Sloan is joint leader of Holland & Knight's global private wealth services practice, and a well-regarded estate planner with an impressive client base. *"He collaborates well with other attorneys – he gives his team space to breathe but steps in when necessary,"* reports a client, adding: *"He can manage a large, multidisciplinary team very efficiently, but can also handle complex matters himself very effectively."* This client also says that *"his breadth of knowledge across multiple practice areas is impressive. He understands how all the minute pieces fit together and can think creatively to solve any problem. He also has the credibility to sit in a room with anyone and make progress."*

One client says private wealth services partner **Meredeth Beers** is *"an exceptional trust attorney who has considerable experience working with high net worth clients as well as extended family members. Our family has come to value her sound judgement as well as appreciating her significant value-add in all related matters."* This client also says that Beers is *"thoughtful, respectful, extremely timely and displays both outstanding knowledge in her field but also an ability to connect with family members that has made these matters smooth and enjoyable."* The client sums up by saying: *"This has been among the best professional services arrangements in my career."*

Ropes & Gray LLP

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Massachusetts attorneys say top-tier Boston firm Ropes & Gray is *"extremely well known for having top-notch attorneys and top-notch clients."* A client praises the firm's private client lawyers for their *"outstanding attentiveness, clear and timely explanations, and strong advice with a broad perspective, including well-considered strategic perspectives and advice."*

As well as handling the full range of trusts and estate planning, administration and litigation matters, the Ropes private client attorneys are noted for acting as fiduciaries for large family trust structures. Another client reports: *"We have an excellent team with an appropriate amount of depth. Most of the work is handled by a couple of attorneys. However, when we have more substantive issues outside of their principal area of expertise, we are quickly able to get to a subject area expert within the firm. When there is a legal issue or requirement out of their jurisdiction, they have appropriate relationships with outside firms and the work is handled effortlessly."*

Notable practitioners

Marc Bloostein receives high praise from interviewees for his private client practice. *"His knowledge of detail is unparalleled, and his common sense is admirable and business-like,"* says a wealth manager, adding: *"He doesn't try to get too clever – he stays away from legally risky approaches that others might easily advocate for their own, rather than the client's, benefit."* Another source says Bloostein is *"intelligent"* and has *"great practical wisdom,"* is *"responsive"* and *"thoughtful,"* with a *"deep understanding of law"* and *"great administrative back-up"* from his colleagues.

Kimberly Cohen wins praise for her *"very sophisticated"* private client practice and *"good client base"* of wealthy individuals and families. Cohen is said to be especially strong on tax planning matters. A client says: *"She is very careful, constantly looking for ways to improve what we are working on, and always brings in others when she feels their knowledge can be helpful."*

Martin Hall *"is accessible, engaged and technically proficient,"* says one source. Hall, a career Ropes & Gray attorney, chairs the firm's private client group and is seen as one of the top trusts and estates practitioners in this market. *"He is a class act,"* says another interviewee, adding: *"He is old-school Boston – an exceptional practitioner who has a great touch with clients."*

One source says **Cameron Casey** is *"outstanding, and her work is incredible."* Another says she is *"very smart – I think she is great,"* and a third describes her as *"awesome – pragmatic and bright."* Casey advises high net worth clients and non-profits on trust and estate planning and administration, and planned charitable giving. A fellow attorney reports: *"She is one of their younger partners, and she emphasises her practice in the charitable space. She is very bright and engaging and will be quite excellent as her practice develops. She really is the whole package."*

Band 2

Morgan, Lewis & Bockius LLP

Morgan Lewis is a full-service, global law firm and has a strong presence in Boston for trusts and estates work. *"They are excellent, they are all over the country and all over the world,"* says a interviewee, adding: *"They have lots of different offices and in-house expertise."* Morgan Lewis is said to be *"strong in the market for high net worth and ultra-high net worth clients – they are committed to this area,"* and it is also praised for its lawyers' *"top-rate service and impressive professionalism with specialised expertise."* One interviewee says the Morgan Lewis attorneys are *"able to advise on complex tax and estate planning matters in an efficient and timely manner,"* and are *"among the best, especially for complex issues and client situations. We have been extremely happy with their services."*

Notable practitioners

Thomas Peckham is a fixture of the Boston estate planning community and widely praised for his legal expertise and his contribution to estate planning in Massachusetts. One of Peckham's peers says he is *"very, very good at what he does – he is amazing."* This source reports that Peckham achieved *"an amazing settlement"* in a recent matter they had with him and says that he is *"knowledgeable and doesn't make things complicated. He has high-end high net worth clients who he does an amazing job for."* Another local estate planner adds that Peckham *"has consistently provided expertise on complicated matters in an easy-to-understand manner."* A third says he is *"incredible – he is very knowledgeable and shares his knowledge. It is a joy to work with him."*

Among interviewees, **Sara Wells** is considered to be one of the future leaders of the Massachusetts estate planning Bar. A private client lawyer at another Boston firm says: *"I would love to see her join us – she is a real mover and shaker in town."* Another competitor says Wells is an *"energetic and smart"* attorney who is *"in this practice area for the long haul."* Wells wins particular praise for her work with entrepreneur clients. *"She is very good – she focuses on clients who own their business,"* says a wealth manager, adding: *"She is very good with clients and is very knowledgeable about estate planning. She is excellent, she has distinguished herself inside and outside the firm. She has always taken care of my client and I trust her."* Wells also receives praise from her clients, with one saying her work has *"stood the test of time,"* adding: *"I could not ask for a better attorney!"*

George Mair is regarded as an *"incredibly knowledgeable"* technical tax practitioner who *"knows a whole lot about the tax code."* He advises on complex issues of state and federal taxation.

Nixon Peabody LLP

The Nixon Peabody private clients team in Boston handles tax, trusts and estate planning and administration matters for high net worth individuals, fiduciaries and charitable organisations. It is particularly noted for cross-border wealth planning, and its *"professional, collaborative and client-oriented"* attorneys are praised for being *"very responsive and thorough."*

"I am so pleased with them," says a client, adding that *"I don't know of anything that they can improve on. They are so attentive, and they respond instantaneously. They are so efficient and knowledgeable. They have the depth to answer all my questions efficiently and effectively."*

Notable practitioners

Sarah Connolly works with high net worth clients to develop estate plans and wealth structures. One source says Connolly is a *"very good lawyer"* who is *"knowledgeable, responsive and represents her clients' interests well."* Another says: *"I have always been very impressed with her. She is very smart and diligent."*

Evelyn Moreno is *"lovely to work with and very personable and committed to clients,"* a source says. Moreno counsels high net worth clients, fiduciaries and non-profits on estate planning and wealth preservation and transfer matters. She is described as *"very knowledgeable"* and as *"articulate, smart and collaborative – a pleasure to work with."* One of Moreno's clients says she is *"unbelievable – I can put a call in and even if she is tied up, she will not leave the office till she calls me. She makes me feel like I am her only client."*

Jay Rosenbaum is best known for his international estate planning work for high net worth clients with significant cross-border interests. *"He is really professional with a wealth of experience in private clients,"* says an interviewee, adding: *"He is really client-focused, pragmatic and a great colleague to work with; the quality of cross-border work he and his team achieves is really impressive. He has very good skills when it comes to risk assessment – which is certainly a very valuable skill for private clients."*

Nutter McClennen & Fish LLP

Nutter is *"a fine, respected Boston firm,"* with a long-standing private client practice in the city. *"They are very good for trusts and estates and have a solid bench"* of attorneys, says one source, with another commenting: *"They are terrific, an excellent trusts and estate shop."*

The private client lawyers at Nutter are especially noted for their work in the charities sector. As well as advising charitable organisations and sitting on the boards of non-profits, the Nutter attorneys often assist high net worth clients with planned philanthropic giving.

Notable practitioners

Natalie Choate, of counsel in the Boston office, is *"the dean of planning with retirement benefits."* Choate has written two important practitioner texts on estate planning for retirement benefits, and local sources say these books are *"key to estate planning"* in Massachusetts and beyond. *"Everyone knows Natalie,"* says one interviewee, adding: *"Her reputation speaks for itself."*

Thomas Jalkut is an *"experienced, very capable, efficient and responsive"* estate planner who is *"well known for probate litigation matters."* He also serves as a trustee of many private trusts and sits on the boards of charitable foundations. One source says: *"He knows the world of trust and estate settlement – he knows so much; he is committed to his work and is a wealth of knowledge."*

William Kirchick handles estate planning for business owners, corporate executives and families with inherited money. He is described as a *"very bright and very committed"* attorney who is also *"very down-to-earth"* and *"relatable,"* and his fellow private client lawyers praise him for sharing his expertise with the wider estate planning community.

Peter Brown advises on estate planning and has particular expertise in philanthropy. He helps clients plan their philanthropic giving and also sits on the boards of several major Boston charities. He is praised for his solution-oriented approach to his legal work, especially in trusts administration.

Band 3

Hemenway & Barnes LLP

Estate planning and private clients form a large part of Hemenway & Barnes' business, and the Boston firm has a longstanding reputation in the local market for this work. Its attorneys often act as fiduciaries for wealthy clients' trusts and help their clients with wealth planning. The Hemenway Trust Company LLC offers investment management and related services.

Notable practitioners

Brad Bedingfield is *"known for his tax proficiency,"* says an interviewee, adding: *"He is a tax guru."* As well as his technical prowess, Bedingfield is also praised for his client relationship skills. *"Brad is a great lawyer, he is very thoughtful and gives good advice,"* reports a fellow attorney, adding: *"He has interpersonal skills and clients trust him."* Another source says Bedingfield is *"a true gem – he is personable and has an incredible knowledge of the tax code. He knows a little about everything and a lot about our world."*

Lourie & Cutler

Lourie & Cutler is a respected estate planning firm in Boston. *"They are boutique-like and have a lot of experience as fiduciaries,"* says a local interviewee, who adds that *"they have very nice clientele."* Another source reports that *"I have a lot of respect for them and they have a lot of knowledge of our world."*

Notable practitioners

David Andelman has *"a spectacular client base,"* sources say, adding: *"He is a draw – people want to work with him."* Andelman is a hugely experienced trusts and estates attorney who often works with business owners and other high net worth individuals.

Amy Naughton is a *"terrific lawyer,"* says a fellow estate planner, adding: *"She is technically proficient and she has a good bedside manner with clients."* This interviewee says they often refer work to Naughton when they are conflicted, and adds that *"she is smart and practical, and works collaboratively."* Another source describes Naughton as *"wonderful"* and says she is *"personable and knows her stuff."*

Megan & O'Shea

Megan & O'Shea is a four-lawyer estate planning boutique based in Concord. *"They are in the suburbs and they are spectacular out there,"* says a Boston attorney, adding: *"They are wonderful people."* Another source says the firm's lawyers are *"technically proficient and people should feel comfortable working with them."*

Notable practitioners

David Megan is a *"technically proficient and well-known"* estate planner with a track record at a large law firm, and has been in practice at his own firm for the last decade and a half. He helps clients with tax, trusts and estate planning matters.

Thomas O'Shea started his career in private practice at WilmerHale and set up Megan & O'Shea with David Megan in 2006. He handles estate planning matters for his clients, who include high net worth individuals.

Other Ranked Lawyers

Patricia Annino of Rimon, P.C. is a *"technically proficient," "knowledgeable lawyer"* who is *"well known in the community,"* according to Boston interviewees. Annino handles business succession and estate planning for high net worth clients, particularly entrepreneurs and business owners.

One attorney reports that **Kenneth Brier** is *"a wonderful resource to brainstorm with and ask questions of."* Another says he is *"fantastic, a tax powerhouse – I would not hesitate to ask him for assistance on a matter."* A third reports that Brier is *"a very solid lawyer with a tremendous amount of knowledge in the tax area."* Brier's firm is Brier, Marandett & Rossetti LLP of Needham.

George Cushing is a *"very well-known name, a very good lawyer and known in the community,"* sources say. Cushing is senior counsel at McLane Middleton Professional Association in Woburn, and is hugely well respected among Massachusetts trusts lawyers. *"He knows everything, he is just a wonderful attorney,"* says one, adding: *"He is unlike anyone else in this area."* Another adds: *"George is a fantastic practitioner – he is one of the very top leaders* *of the trusts and estates Bar. He is the person people go to with difficult questions or complicated problems. He has a tremendous amount of knowledge."*

Michael Fay of Verrill Dana, LLP is *"extremely experienced, very smart and really cares about his clients,"* a source says. Fay assists wealthy families with wealth preservation and transfer matters. Another interviewee reports that *"he has been great; he has given me advice for sophisticated planning and it is such a joy to work with him."*

Jillian Hirsch of Hirsch Law is a very highly regarded trusts and estates litigator. One fellow estates lawyer reports that *"I have a lot of respect for her,"* describing Hirsch as *"incredibly thoughtful,"* and recommends her *"if you want someone to mediate, collaborate and find a solution that saves money."* Another attorney says Hirsch is *"a great advocate for her clients and zealously fights for her clients' interests,"* and a third says that *"I would be happy to have her on the other side and work with her."*

Kurt Steinkrauss *"bridges corporate work with private client work,"* sources say. Steinkrauss chairs the closely held business group and co-chairs the private equity practice at Mintz Levin Cohn Ferris Glovsky and Popeo PC, and he is seen as one of the rising figures in the Boston estate planning community. *"He has done a great job in building an incredible book of clients,"* says one of Steinkrauss' peers, adding: *"He is all over the biggest matters in town."* Another says: *"He is extremely well respected in Boston. He is very outgoing, his clients adore him and are very devoted to him. He is as involved in the Boston community as you can be."*

Robert Vigoda of Rubin and Rudman LLP advises on estate planning and trust administration matters. One source says: *"He is very personable and is a jack of all trades. He is terrific on planning for business owners and entrepreneurs. He is well respected and deserving of his reputation."*

Family/Matrimonial High Net Worth

Family/Matrimonial: High Net Worth
Massachusetts
Leading Individuals
Band 1
Doniger Anthony M *Sugarman, Rogers*
Jacobs Norman *Esdaile Barrett Jacobs*
Lee David *Lee & Rivers LLP*
Band 2
Federico Phyllis *Schmidt & Federico*
Schmidt Mary *Schmidt & Federico*

Ranked Lawyers

Matrimonial specialist **Anthony Doniger** of Sugarman, Rogers, Barshak & Cohen, PC is *"a long-time Boston attorney in that space,"* according to one local interviewee, who describes Doniger as *"wonderful"* and says he is *"practical, has a lovely demeanour, is sensible and has great judgement."* Another source says Doniger has an *"excellent reputation, and I have referred many clients to him – he is very experienced can deal with complex situations."*

Phyllis Federico of Schmidt & Federico handles divorce, child custody and nuptial agreements. One source says: *"She will help you resolve your issues – she is very intelligent and has a wonderful manner. She is very confident in her skills, and is soft-spoken and pragmatic."*

Norman Jacobs of Esdaile Barrett Jacobs & Mone is widely considered to be *"the dean of the divorce Bar"* in Massachusetts. One source says: *"He is a go-to person for complicated, difficult family law matters – he has very solid judgement and great ability to talk to the client, calm them down and come up with sensible solutions."*

Boston family lawyer **David Lee** of Lee & Rivers LLP is *"very strong,"* according to one of his fellow attorneys, who adds: *"He has been doing this for years and has a tremendous amount of experience."* Sources say Lee is *"known for handling high-end stuff"* and that *"his reputation in the community is that he is one of the best."* He is also praised for his resolution-focused approach to matrimonial law matters. One interviewee describes Lee as a *"very, very seasoned"* practitioner, who is *"smart and practical – he is just a thoughtful, good counsellor. He gives his client good business advice."*

Mary Schmidt of Schmidt & Federico is *"well known for her family law expertise"* and has *"a good reputation"* in this practice area. Massachusetts trusts and estate attorneys also praise Schmidt for her understanding of their practice area as well as her own; one says she is *"a hybrid – she knows our world and family/matrimonial."*

Accountants & Tax Advisers

Accountants & Tax Advisers
Leading Firms
Andersen
Daigle & Associates
DiCicco, Gulman & Company LLP
Wolf & Company PC

Andersen

One Boston-based trusts and estates attorney says the tax team at Andersen is *"excellent,"* adding that *"they are extra-talented and smart, give great advice to the clients and can work through complicated issues."* A fellow lawyer also reports that *"I have referred my best and most important work to them; they operate consistently at the highest level. They are expensive but they are worth it, because they do a really superb job. They are at the top of the pile nationwide."*

Boston office managing director Michael Hough wins particular praise. Hough specialises in income tax planning and estate planning, and is said by one interviewee to be *"quite excellent."* This speaker explains that Hough is *"very creative, thoughtful and has great clients."* Another source says: *"Mike Hough is well known in the community and well versed in income taxes."*

Key contact:

Michael Hough, Office Managing Director – Boston

Daigle & Associates

Boston accounting firm Daigle & Associates wins high praise from Massachusetts commentators for its high net worth services. An interviewee says the Daigle team is made up of *"top-tier CPAs"* who offer *"excellent service and expertise,"* and praises the team for being proactive and *"picking up problems that no one saw."* A local private client attorney says the Daigle firm is *"excellent,"* and notes that *"they have great synergy between what they do and what we do."* Another describes the group as *"lean and mean"* and *"my go-to team,"* adding that *"they are practical and thoughtful."*

Key contact:

Anthony J. Daigle, Managing Partner

DiCicco, Gulman & Company LLP

DGC is a Massachusetts firm with a *"great reputation"* in this market. It offers tax, audit and accounting and business advisory services, and its private client group works with high net worth clients on tax and estate planning, business successions and wealth transfer.

One interviewee describes the firm as *"wonderful"* and *"terrific,"* explaining that *"their client service is outstanding, and their knowledge of complex matters is second to none."* Another notes that its team has *"great clients"* in the private client world and highlights its strong presence in the Boston market for high net worth tax planning.

Key contact:

Richard Gulman, Partner and Co-founder

Wolf & Company PC

Wolf and Company has offices in Boston and Springfield, as well as Albany, NY and Livingston, NJ. A Boston-based interviewee says the firm has *"a full-service offering"* and is *"excellent on the private client side,"* explaining that *"they are knowledgeable, responsive team players."*

A Boston-based interviewee says tax principal and private client specialist Hillary Burr is *"smart, thoughtful and works really well with the client's legal team and investment professionals."*

Key contact:

Carol E. Tully, Member

Private Banks

Private Banks
Leading Firms
BNY Mellon Wealth Management
Brown Brothers Harriman & Co.
First Republic Bank
Goldman Sachs
Leading Individuals
Penta Adrienne *Brown Brothers Harriman & Co.*

BNY Mellon Wealth Management

BNY Mellon has a strong wealth management division in its Boston office, and local market insiders say the bank has *"some very big clients"* in this market.

"They are excellent – they have great resources and good attentiveness to client needs," says a source, who adds that *"Brenda Travaglini is high-level and quite terrific,"* and that Stephen Colella and William Jarry *"are fantastic and on their way to the top"* in this market. Another source says Jarry is *"amazing,"* and that Jeremiah Doyle is *"unbelievable,"* adding that *"I can go to him for any questions, his presentations are amazing fun and engaging, and he so knows what he is doing and is comfortable fielding questions."*

Key contact:

William Jarry, Senior Director

Brown Brothers Harriman & Co.

Brown Brothers Harriman wins significant praise for its *"outstanding client service"* in Boston. *"They are old-line but very thoughtful, and they have modernised their offering,"* reports a local attorney, adding: *"They are very effective with clients in not just dealing with them on the technical side – they're proactive and interactive."* Another Boston attorney describes it as a *"very good private bank"* which provides *"bespoke, tailored"* service, adding that *"clients really like the high level of service that they provide."*

BBH is considered to have a *"great team"* in Boston, many of whom are former trust and estate attorneys. *"I have a high regard for them,"* says an interviewee, adding: *"They are very good people there."* This source also says Adrienne Penta *"does a super job,"* reporting that she is *"savvy, client-attentive and understands her clients' needs and values."* Another commentator highlights Adrienne Penta and the Center for Women & Wealth, which Penta founded at BBH, as standouts of the Boston private banking scene. This interviewee says: *"Adrienne Penta is very well respected. They are well known in the community – they're known to be thorough, hard-working and loyal to their clients."*

Key contact:

Adrienne Penta, Senior Vice President – Center for Women & Wealth

First Republic Bank

First Republic is seen as the coming force in Boston private banking. *"I'm seeing a lot more work with them,"* says a local attorney, who adds: *"I'm newer to working with them, and they are growing their Boston presence. I love their creativity and their ability to work with trusts – they really are flexible."* Another reports that First Republic is *"very client service-focused,"* adding that *"they have a lot of loyal customers and their client service is excellent."*

Sources say First Republic's bankers and wealth managers are *"very responsive, helpful and proactive in looking after their clients."* One source reports that *"they are tied in to the private equity/hedge fund community,"* while another says *"they are very attuned to the needs of high net worth clients and are very client-friendly – they can deal with complexities and find resolutions."*

Key contact:

James Atwood, Senior Managing Director and Wealth Manager

Goldman Sachs

"I am always happy when it's Goldman," says a local trusts attorney when asked about their favoured collaborators on private wealth matters. This source says Goldman has *"a great offering"* in this market, and that *"they are very responsive and put the interest of the client at the centre of everything they do."*

"They are terrific," says another interviewee, who adds: *"They are beefing up their family office offering and they can offer a lot of things under one umbrella."* This source also praises Goldman's *"very responsive, client-focused staff."* Interviewees also report that the Goldman team gives *"extraordinary client service"* and *"does a good job of balancing portfolios"* for its clients.

Key contact:

Pamela Ryan, Managing Director

Wealth Managers

Wealth Managers
Leading Firms
Ballentine Partners
Bessemer Trust
Cambridge Associates, LLC
Daintree Advisors LLC
Lake Street Advisors, LLC
Loring, Wolcott & Coolidge
Northern Trust
SCS Financial

Ballentine Partners

Ballentine Partners is a boutique wealth planning and investment management firm. For clients with investable assets over USD20 million, it also offers family office services.

"They are a smaller shop but they have some very talented people there," says an interviewee. Another source notes that *"they are very good on client service – they provide comprehensive family office summaries, account aggregation and so on."* This source also reports that *"Drew McMorrow has some very loyal clients."*

Key contact:

Drew McMorrow, President and CEO

Bessemer Trust

Bessemer Trust is a national wealth management firm with a sizeable presence across New England. It is particularly strong in the Boston market.

One local source says Bessemer is *"terrific,"* praising its *"very broad offering."* Another states that *"they have a high calibre of clients, and they are really on top of developments in the area."* A third says: *"It is really good – they know what they are doing and they give information when required. Any questions and follow-up are easy to process with them."*

Key contact:

Timothy McBride, Managing Director and Regional Director

Cambridge Associates, LLC

Cambridge Associates has *"a wonderful reputation,"* says one Massachusetts source, while another says: *"They are in a league of their own."*

An interviewee who has worked with Cambridge Associates recently describes it as a *"great firm with great clients,"* explaining that *"they are great asset allocators,"* and reporting that *"as a firm, they are great – every client team has had different people but they are all excellent."*

Key contact:

Doug Macauley, Managing Director

Daintree Advisors LLC

Daintree Advisors is seen as one of Boston's top choices for clients seeking an independent wealth management adviser. The firm is praised for having *"a very personal feel to their offering."*

Another source says: *"I love them – those guys are great."* This source highlights partner William Speciale in particular.

Key contact:

David L. Beatty, Founder and CEO

Lake Street Advisors, LLC

Independent New England wealth manager Lake Street Advisors wins significant praise from local interviewees.

"I think of them as financial planners, and they do some asset management now too," says a Boston-based trusts and estate attorney, adding: *"They have the client's whole picture in mind, and they do a really good job on reaching out to me when there are issues; they have much better sense of how to keep the lawyer involved."* Another interviewee says Lake Street has *"some very good clients,"* and adds that *"they are proactive, smart and work well with the whole advisory team."*

Key contact:

Gregory Van Slyke, Founding Partner

Loring, Wolcott & Coolidge

Independent wealth manager Loring Wolcott & Coolidge has a *"first-class reputation"* in the Boston market. The firm is described as *"an old-line trust business from way back,"* and as *"a very good, solid firm"* that is *"collaborative to work with."*

"They are fantastic," says a source, who adds: *"They have their own view of how to manage investments, they are not giving you the same old thing. Each of the partners has a background in investing and they take it seriously. They are a good and sensible trustee."*

Key contact:

David Boit, President

Northern Trust

Massachusetts interviewees continue to praise Northern Trust for its service offering in this market. *"They are more cutting-edge and forward-thinking,"* says one local source, adding: *"Northern has more to offer and more of a deep bench, and it's winning clients. I see very good clients getting great services and performance."*

"Hands down, bar none, they would be first," says a local lawyer, who describes Northern as *"smart, sophisticated and thorough,"* also praising its focus on understanding its clients' goals, and adding: *"If I hit the lottery tonight, they are getting a call from me tomorrow morning."*

Key contact:

Christopher Perry, Senior Fiduciary Officer Boston

SCS Financial

Investment management firm SCS Financial has a strong reputation in the Boston market. It also has offices in New York, NY and Los Angeles, CA.

One source says that *"they are a great high-level firm and they do very well on the investing side."* Another reports that *"they take on the most significant of client relationships and they do it all."* Its team is considered to be *"very capable, experienced and knowledgeable."* A further interviewee says: *"Technically they are proficient; I have clients who are with them, who they are terrific with."*

Key contact:

Anthony J. Abbiati, Co-Founder and Co-Head of Private Client Group

ROPES & GRAY LLP

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Managing Partner: David Djaha
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Firm Overview:
Ropes & Gray attorneys focus on the most critical business needs of clients, across a range of leading legal practices. The firm's collaborative approach means that its clients have ready access to corporate, litigation, transactional and regulatory attorneys whose knowledge and experience span industries and geographies. The firm is also committed to pro bono service, with 172,000 hours dedicated to underserved communities in 2019.

Private Client:

Ropes & Gray's private client group has a longstanding reputation in the trusts and estates market. An industry insider reports: *"They have real expertise in managing wealth due to their historic role in this market. They are a very well-known firm, in Boston especially, but also across the USA." — Chambers HNW*

The team has particular expertise in matters relating to the management and transfer of wealth, advising on issues relating to domestic and international estate and income tax planning, implementing trust arrangements — in many cases Ropes & Gray attorneys serve as trustees — and, through the wholly owned subsidiary Ropes Wealth Advisors LLC, the team offers a full range of financial planning and investment advice. The private client group's charitable foundations practice offers strategic, sophisticated advice to private foundations and other charitable organisations.

The private client group is supported by more than 35 professionals, including trust administrators, tax accountants, probate accountants, philanthropic advisors, and estate settlement administrators. The integrated, comprehensive approach to planning provides clients with control over their affairs and allows for flexibility in adapting to changing needs. An impressed client adds: *"We have a tremendous amount of respect for the attorneys at Ropes," "a highly respected firm," "very technically proficient," and "at the top of the food chain." — Chambers HNW*

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Main Areas of Practice:

Antitrust:
The team offers top-flight, sophisticated insight in addressing the wide-ranging needs of clients, with a proud record of success in the courtroom and representing clients clearing transactions before US antitrust enforcement agencies.

Asset Management:
With leading practices in hedge funds, private investment funds and registered funds, Ropes & Gray is uniquely positioned to offer asset management advice in a constantly shifting investment and regulatory environment.

Business Restructuring:
In bankruptcy cases, insolvencies and distressed situations, attorneys provide superior legal advice and deliver innovative business solutions that uphold clients' values.

Finance:
An understanding of market dynamics and deep relationships in the financing community allows clients to focus on the up-side case of their business plans.

Health Care:
Clients benefit from a deep experience and its intimate knowledge of clients' industries in the face of tremendous change driven by growing demand, new technologies, shifting business models and intense government scrutiny.

Intellectual Property:
Combining a sophisticated understanding of the latest legal developments with cutting-edge technical and scientific matters, the firm's attorneys offer cohesive and comprehensive guidance on all types of IP matters.

Life Sciences:
Attorneys in the global life sciences group understand the unique needs of a wide range of clients in the dynamic life sciences industry.

Litigation & Enforcement:
Global business leaders across industries turn to the firm's experienced litigators for creative and successful solutions to sensitive matters and critical disputes. On enforcement matters, Ropes & Gray's attorneys understand business and regulation and help clients preempt, resolve or mitigate the impact of government investigations and enforcement actions.

M&A:
The firm's 260 M&A attorneys have guided more than $400 billion in M&A transactions over seven years — many deals involving complex cross-border and multijurisdictional issues.

Privacy & Data Security:
The firm helps clients navigate the complex legal landscape surrounding data management, compliance, enforcement and litigation.

Private Equity Transactions:
Clients receive unsurpassed counsel throughout the transaction life cycle from one of the world's largest and most sophisticated private equity practices.

Real Estate Investments & Transactions:
Drawing on its attorneys' vast knowledge and experience, Ropes & Gray offers clients the comprehensive range of legal services required to identify opportunities, manage risks and succeed in today's volatile global real estate market.

Tax & Benefits:
The long-standing representation of clients with dominant market positions has enabled Ropes & Gray to build a comprehensive knowledge base.

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