

Charles A. Cheever

Co-Managing Partner



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Practice Areas

Wealth Management
 Family Office Services

Education

University of Virginia School of Law
 JD (1995)

Harvard University
 BA (1990)

Admissions

Massachusetts

Charles Cheever, Choate's co-managing partner since 2014, helps high net worth clients manage their planning, tax, and investment responsibilities in order to meet their financial goals for their families. Charles works deliberately to get to know his clients and their families personally in order to provide advice that is independent and focused exclusively on what is best for each client. With deep experience serving as trustee for more than \$1 billion in assets, he utilizes the full range of Choate's Family Office Services Group to deliver fully integrated counsel in estate planning, income and gift tax planning and return preparation, investment advice, portfolio management, and trustee services.

Charles serves as co-chair of Choate's Wealth Management Group and is a member of the Firm's Executive Committee.

Representative Engagements

- Planned tax strategies to preserve and manage \$30 million of waterfront property for multiple generations of single family.
- Executed estate planning strategy for venture capital client that transferred \$66 million to children free of gift tax through grantor retained annuity trust.
- Created limited partnerships, limited liability companies and trusts for asset protection and wealth preservation purposes, including recent tax-free sale of multi-million dollar commercial real estate to long-term family trust.

Publications and Presentations

- "You Don't Have to be a Billionaire to Plan Like One," quoted, *Forbes*
- "Practice Management: Trust Solves a \$30 Million Problem," featured, *The Wall Street Journal*

Charles speaks regularly on estate planning and wealth management strategies throughout Massachusetts.

Professional and Community Involvement

- Member of many charitable organizations, including the Massachusetts Charitable Society and Perkins School for the Blind
- Member, American Bar Association
- Member, Boston Bar Association

Recognition

- *Best Lawyers in America* (2009-2024)
- *Massachusetts Super Lawyer*