

## William A. Lowell

### Senior Counsel



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#### Practice Areas

Wealth Management  
Family Office Services

#### Education

Boston College Law School  
JD (1980) *magna cum laude*

Harvard College  
AB (1977) *cum laude*

#### Admissions

Massachusetts

Bill Lowell helps high net worth clients to grow and protect multi-generational wealth through sophisticated estate planning. Collaborating with Choate's trust, tax, and investment advisory resources, he develops strategies for minimizing income, gift, and estate taxes and increasing investment returns. He also serves as trustee for many of his clients.

Bill was named by the Supreme Judicial Court of Massachusetts to serve on the Ad Hoc Committee to study and report to the Court on Bosch litigation.

#### Representative Engagements

- Serves as trustee of numerous trusts and charitable foundations, and as executor of various estates.
- Together with personnel from Choate's trust department, tax preparation group, and Choate Investment Advisors, provides clients with sophisticated income, gift and estate tax planning, and investment advice to maximize charitable deductions and minimize taxes.
- Works with Choate Investment Advisors to provide integrated investment, financial planning, and estate planning advice to clients regarding their personal assets and retirement accounts, including assuming responsibility for funding their revocable trusts to avoid probate and serving as their trustee.
- Represents public and private company executives to structure and implement plans to benefit both family members and philanthropic interests.
- Represents multiple generations of client families in coordinating tax and wealth management strategies to benefit future generations.
- Represents lottery winners in connection with estate planning and individual planning, including the creation and management of trusts and private charitable foundations.
- Creates limited partnerships and limited liability companies for asset protection and wealth preservation purposes.
- Served as court-appointed administrator of complex intestate estate involving abandoned property accounts in multiple jurisdictions.

#### Publications and Presentations

- "Fixing Crummey Problems," co-author, *Trusts & Estates*
- "Changes Ahead," co-author, *Financial Advisor Magazine*

## Professional and Community Involvement

- Member, Boston Probate Forum
- Member, Tax Section of the American Bar Association
- Member, Trusts and Estates Section of the Boston Bar Association
- Trustee, Northeastern University
- Trustee, WGBH
- Member, Corporation of the Museum of Science
- Member, Corporation of the Perkins School for the Blind

## Recognition

- *Chambers HNW Guide*
- *Best Lawyers in America*
- *Massachusetts Super Lawyers*
- Dean's Social Impact Award from the College of Professional Studies at Northeastern University
- Massachusetts Governor's Award in the Humanities on behalf of The Lowell Institute
- Fellow of The American College of Trust and Estate Counsel