

## Marc J. Bloostein

### Partner



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#### Practice Areas

Family Office Services  
Wealth Management

#### Education

Cornell Law School  
JD (1988) *cum laude*  
Managing Editor, *Cornell Law Review*

Brandeis University  
BA (1985) *magna cum laude*

#### Admissions

Massachusetts  
New York

Marc Bloostein provides sophisticated estate planning advice to high-net worth individuals and families. He has over 30 years of experience in all aspects of trust and estate administration, including advising fiduciaries and beneficiaries and serving as trustee for multiple family trusts. He is a trusted advisor to private equity and hedge fund principals and to their firms, helping them structure funds to generate estate planning opportunities and providing them with thoughtful advice on effective wealth transfer strategies.

Marc is generous in sharing his legal experience and knowledge. He teaches a course on estate planning at Harvard Law School and frequently lectures to lawyers on estate planning topics. He was instrumental in the 2012 enactment of the Massachusetts Uniform Trust Code, and chaired a committee that recommended the Uniform Trust Decanting Act for adoption in Massachusetts.

#### Publications and Presentations

- "Focus on Ethics," presenter, MCLE's Annual Estate Planning Conference, April 2024
- "Basics of the Generation-Skipping Transfer Tax," speaker, New England Fellows Institute of the American College of Trust and Estate Counsel, February 2022
- "Mechanics of Decanting and Non-Judicial Settlements," co-presenter, Massachusetts Bar Association's Sixth Annual Probate Law Conference, November 2019
- "Marital Estate Planning After Tax Reform," co-presenter, Massachusetts Continuing Legal Education, Inc., July 2019
- 20th Annual MCLE New England Estate Planning Conference, chair, May 2019
- "Wide support seen for uniform decanting bill," quoted, *Massachusetts Lawyers Weekly*, March 28, 2019
- "Mechanics of Decanting and Non-Judicial Settlements," co-presenter, Massachusetts Bar Association's Sixth Annual Probate Law Conference, November 2018
- "Marital Estate Planning After Tax Reform," co-presenter, Massachusetts Continuing Legal Education, Inc., July 2018
- "Proposed Adoption of Uniform Trust Decanting Act," co-presenter, Boston Probate Estate Planning Forum, May 2018
- "Your Money: New U.S. Gift Tax Strategies Could Alter Giving," quoted, *Reuters*, March 14, 2018

- 19th Annual MCLE New England Estate Planning Conference, chair, March 2018

## Professional and Community Involvement

- Co-chair of the Boston Bar Association's Trusts and Estates Section (2011-2013)
- Chair of the Uniform Trust Decanting Act Review Committee and recommended its enactment in Massachusetts
- Member of the Uniform Trust Code Review Committee for enactment in Massachusetts and co-author of the committee's report
- Member, Probate Court of Massachusetts Uniform Probate Code Implementation Committee
- Member, Supreme Judicial Court's Ad Hoc Committee on Bosch Reformation Cases
- Trustee, Charles F. and Beatrice D. Adams Charitable Trust
- Fellow, American College of Trust and Estate Counsel

## Recognition

- *Chambers High Net Worth USA Private Wealth Law: Eastern Region* (2016-2024)
- *Chambers High Net Worth Massachusetts Private Wealth Law* (2016-2024)
- *The Best Lawyers in America* (2010-2023)
- *Best Lawyers "Lawyer of the Year" – Trusts & Estates* (2015, 2017, 2019, 2021)