

A family of five is hiking on a grassy hill. In the foreground, a man in a grey shirt and a young girl in a checkered shirt are walking. Behind them, a woman in a blue shirt, a man in a white shirt with a backpack, and another woman in a red shirt with a backpack are walking. They are all looking towards a body of water in the distance, which is surrounded by trees and hills.

## Estate Planning, Tax & Probate

### OVERVIEW

At Rich May, P.C., we provide sophisticated estate planning and settlement services to a wide range of clients, including professionals, business owners, retirees and other individuals and their families. Our attorneys provide sound advice, personal service, technical proficiency and sensitivity to client needs.

We help clients achieve their estate planning goals. Our attorneys are knowledgeable in sophisticated methods to minimize estate, gift and inheritance taxes. We also advise trustees, personal representatives, and beneficiaries on trust administration and probate matters.

We offer a variety of tax, estate planning and fiduciary services including:

- Tax planning for individuals, businesses and exempt organizations
- Wills, pour-over trusts, irrevocable trusts, durable powers of attorney, healthcare proxies, living wills, and statutory trusts for care of an animal
- Advanced estate planning techniques for high net-worth clients, including gifting programs, irrevocable life insurance trusts, family limited partnerships and qualified personal residence trusts
- Preparation and submission of filings with the Probate Court such as wills, licenses to sell real estate, and letters of appointment
- Preparation of federal and state estate tax returns
- Trust Administration, including preparation of annual accounts and coordination of preparation and filing of annual federal and state income tax returns

### Services

[Business, Corporate & Securities](#)  
[Commercial Lending](#)  
[Commercial Real Estate](#)  
[Employment & Employee Benefits](#)  
[Energy, Renewables & Regulated Industries](#)  
[Estate Planning, Tax & Probate](#)  
[Investment Management & Private Funds](#)  
[Litigation & Dispute Resolution](#)  
[Real Estate Development](#)  
[Trademark & Copyright](#)

### Attorneys

[Erica P. Bigelow](#)  
[Danielle Justo](#)  
[Howard L. Levin](#)  
[Gerald V. May, Jr](#)  
[Mark C. O'Connor](#)

- Representation of parties in disputes over interpretation and enforcement of wills and trusts and other estate matters

## TOOLKIT ON COMMON ESTATE PLANNING DOCUMENTS

One of the common questions we hear from clients is “when and why should I seek an estate plan?” Especially for younger clients, planning for death can seem unnecessary in the short term. However, estate planning is a great tool to minimize state and federal taxes, provide for your spouse, children, or other loved ones, and ensure you are cared for as you wish. Click below for a summary of the recommended documents for your estate plan and their functions:

- [Documents effective at death: Wills and Trusts](#)
- [Documents effective during life: Healthcare Proxy, Living Will, and Durable Power of Attorney](#)
- [Frequently Asked Questions](#)

## EXPERIENCE

- Implemented gift tax planning for use of lifetime federal gift tax exemption.
- Successfully navigated a gross estate in excess of \$60 million through the IRS and Massachusetts return process.
- Coordinated with the Massachusetts Department of Revenue and the IRS, including seeking private letter rulings.
- Represented company involved in employee’s divorce proceedings due to ownership structure.