CHOATE

Rachel Y. Meagher

Principal

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Practice Areas

Family Office Services
Wealth Management

Education

Harvard Law School
JD (2011) *cum laude*

Wesleyan University
BA (2006) *with honors*

Admissions

Massachusetts
New York

Rachel Meagher advises high net worth families and individuals on all aspects of their estate plans, including both tax and non-tax considerations. Her practice includes administration of trusts and estates, inter-generational planning and sophisticated wealth transfer techniques.

Rachel enjoys working closely with her clients to ascertain their individual goals and concerns, and brings her years of experience in trusts and estates to identify and implement practical, tax-efficient solutions.

Representative Engagements

- Design and implement strategies for modifying the terms of existing irrevocable trusts, including trust "decantings" and out-of-court settlement agreements.

- Advise clients on sophisticated strategies for lifetime asset transfers, including spousal lifetime access trusts (SLATs), multi-generational irrevocable trusts, grantor retained annuity trusts (GRATs), qualified personal residence trusts (QPRTs), family limited liability companies, sales to grantor trusts, life insurance trusts and other tax-advantaged strategies.

Publications and Presentations

- "Schedule L of Form 706 – Net Losses During Administration," co-author, *Preparing Fiduciary Income, Gift, and Estate Tax Returns*, MCLE, 2022