

## Kimberly E. Cohen

### Partner



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#### Practice Areas

Family Office Services  
Wealth Management

#### Education

Cornell Law School  
JD (1997) *magna cum laude*  
Order of the Coif

Dartmouth College  
BA (1994) *with honors*

#### Admissions

Massachusetts  
New York

Kimberly Cohen is known for her strategic planning advice and extensive estate planning experience. Kim regularly counsels entrepreneurs, partners of private equity firms, venture capitalists, private and public company officers and shareholders, and high net worth individuals and families in the development and implementation of sophisticated planning techniques to aid with the accumulation, preservation, and transfer of wealth. She has particular experience working with private equity and hedge fund clients in the Boston and New York regions.

In addition, Kim serves as a trustee for many family trusts and helps clients achieve their philanthropic goals through vehicles such as private foundations, charitable remainder and lead trusts, and charitable gift annuities.

Kim is also a frequent lecturer on new developments in the estate planning area including at the Heckerling Institute on Estate Planning, The American College of Trust and Estate Counsel (ACTEC) Annual Meeting, and The American Law Institute Awards.

#### Publications and Presentations

- “Advanced Estate Planning Practice Updates,” panelist, American Law Institute Continuing Legal Education triannual national webcasts, 2019
- “GST Exemption a Victim of ‘Sloppy Drafting,’ but It May Not Matter,” quoted, *Tax Analysts*, March 16, 2018
- “Hot Topics,” co-presenter, ACTEC National Meeting, San Antonio, Texas, March 2018
- “New Inflation Adjustment May Complicate Estate Planning,” quoted, *Tax Analysts*, February 7, 2018
- “Guidance Plan Placement May Signal Estate Project Course Change,” quoted, *Tax Analysts*, February 7, 2018
- “Advanced Estate Planning Practice Updates,” panelist, American Law Institute Continuing Legal Education triannual national webcasts, 2018

#### Professional and Community Involvement

- Vice Chair of Estate and Gift Tax Committee, ACTEC

#### Recognition

- *The Best Lawyers in America* Trusts and Estates “Lawyer of the Year” (2023)
- *Boston Magazine* “Top Lawyers” (2021-2022)

- *Chambers High Net Worth* (2016-2023)
- *Chambers USA* (2011-2020)
- *Best Lawyers in America* (2015-2024)
- *Massachusetts Super Lawyers* (2016-2023)