CHOATE

Charles A. Cheever

Co-Managing Partner

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Charles A. Cheever serves as one of the firm's co-managing partners.

He is listed in *Best Lawyers in America* and named a *Massachusetts Super Lawyer*.

EDUCATION

University of Virginia
School of Law JD, 1995

Harvard University
BA, 1990

PRACTICE FOCUS

Wealth Management

Mr. Cheever represents multiple generations of domestic and international families, focusing on the tax-efficient transfer of wealth from older to younger generations using a variety of sophisticated planning techniques. He also focuses on developing legal and trust structures to manage family wealth, which includes establishing and advising private family foundations. Mr. Cheever also serves as a professional trustee for many of his client families. Details of the elements of Mr. Cheever's practice are below.

Estate Planning

Drafts wills, trusts, limited partnerships, grantor retained annuity trusts, qualified personal residence trusts and related estate planning instruments for families, entrepreneurs and executives.

Investment Management

Manages more than $600 million in assets through Choate Investment Advisors.

Trustee

Serves as trustee to multiple generations of domestic and international client families.

Trust & Estate Administration

Provides full service financial support, including financial planning projections, bill payment, and retirement planning.

Income Tax Planning, Advice & Return Preparation

Represents clients before the Internal Revenue Service in Washington, DC and Boston.

ADMISSIONS
Massachusetts

PRACTICE AREAS
Wealth Management

REPRESENTATIVE ENGAGEMENTS

- Planned tax strategies to preserve and manage $30 million of waterfront property for multiple generations of single family.
- Executed estate planning strategy for venture capital client that transferred $66 million to children free of gift tax through grantor retained annuity trust.
- Created limited partnerships, limited liability companies and trusts for asset protection and wealth preservation purposes, including recent tax-free sale of multi-million dollar commercial real estate to long-term family trust.

PUBLICATIONS AND PRESENTATIONS

- "You Don't Have to be a Billionaire to Plan Like One," *quoted, Forbes*, April 2012.
- "Go Beyond the Call of Duty - Just Not for Everyone," *quoted, InvestmentNews*, February 2010.
- "Practice Management: Trust Solves a $30 Million Problem," *featured, The Wall Street Journal,* June 2009.

Mr. Cheever is a speaker on estate planning and wealth management strategies throughout Massachusetts.

PROFESSIONAL AND COMMUNITY INVOLVEMENT

Mr. Cheever is a member of the firm's Executive Committee. He is a member of many charitable organizations including the Massachusetts Charitable Society and Perkins School for the Blind.

Mr. Cheever is a member of the American Bar Association and the Boston Bar Association