CHOATE

William A. Lowell

Partner

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Bill Lowell is a partner in Choate's Wealth Management Group.

Mr. Lowell is listed in *Chambers HNW Guide* 2019, *Best Lawyers in America* and named a *Massachusetts Super Lawyer*. Mr. Lowell also received the Dean's Social Impact Award from the College of Professional Studies at Northeastern University and accepted the Massachusetts Governor's Award in the Humanities on behalf of The Lowell Institute.

Mr. Lowell was named by the Supreme Judicial Court of Massachusetts to serve on the Ad Hoc Committee to study and report to the Court on Bosch litigation.

EDUCATION

Boston College Law School
JD, 1980, *magna cum laude*

Harvard College
AB, 1977, *cum laude*

REPRESENTATIVE ENGAGEMENTS

- Serves as trustee of numerous trusts and charitable foundations, and as executor of various estates.
- Together with personnel from Choate's trust department, tax preparation group and Choate Investment Advisors, provides clients with sophisticated income, gift and estate tax planning and investment advice to maximize charitable deductions and minimize taxes.
- Works with Choate Investment Advisors to provide integrated investment, financial planning and estate planning advice to clients regarding their personal assets and retirement accounts, including assuming responsibility for funding their revocable trusts to avoid probate and serving as their trustee.
- Represents public and private company executives to structure and implement plans to benefit both family members and philanthropic interests.
- Represents multiple generations of client families in coordinating tax and wealth management strategies to benefit future generations.
- Represents lottery winners in connection with estate planning and individual planning, including the creation and management of trusts and private charitable foundations.
- Creates limited partnerships and limited liability companies for asset protection and wealth preservation purposes.
- Served as court-appointed administrator of complex intestate estate involving abandoned property accounts in multiple jurisdictions.

ADMISSIONS
Massachusetts

PRACTICE AREAS
Wealth Management

PUBLICATIONS AND PRESENTATIONS

- “Fixing Crummey Problems,” *co-author, Trusts & Estates*, July 2012.
- “Changes Ahead,” *co-author*, *Financial Advisor Magazine*, December 2010.

PROFESSIONAL AND COMMUNITY INVOLVEMENT

Mr. Lowell is a Fellow of the American College of Trust and Estate Counsel and a member of the Boston Probate Forum, the Tax Section of the American Bar Association and the Trusts and Estates Section of the Boston Bar Association.

Mr. Lowell serves as a Trustee of Northeastern University and WGBH. He also serves as a member of the Corporation of the Museum of Science and Perkins School for the Blind.