CHOATE

www.choate.com

Andree M. Saulnier

OF COUNSEL

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Andree Saulnier helps high net worth clients to grow and protect multi-generational wealth. She has extensive experience in drafting and administering estate and trust plans; knowledge of current estate tax laws, including estate tax minimization, planned giving, business succession, and use of family limited partnerships; and estate planning for pension benefits and families with disabled children.

In addition to providing estate planning and other advice to clients, Andree oversees the Choate Family Office Services estate administration practice.

Focus Areas

Choate Wealth

Representative Engagements

- Advising high net worth individuals on formulation of estate plans that provide substantial tax savings to future generations of client's family and that effectively implement client's philanthropic goals, including creation of GRATs, family limited partnerships, charitable remainder trusts, and charitable foundations.
- Representation of U.S. citizens and resident aliens with international estate planning concerns and settlement of estates with property in foreign countries including Canada, Israel, Ireland, France, England, Venezuela, Mexico, and Brazil.
- Advising families and corporate fiduciaries in administration of large and complex estates that include family business interests, closely-held stock, limited partnerships and LLC interests, valuable estate holdings, and art.
- Successful settlement of complex estate tax audits resulting in significant tax savings for family, including in some cases tax savings in excess of $1 million.
- Advising parents of special needs children in formulation of their estate plans, and bringing to that process the unique perspective of a parent of two special needs children who also has extensive knowledge of relevant government benefits and tax laws applicable to this area of law.
- Service as trustee of revocable and irrevocable trusts and coordination of trustee services with the firm's Tax and Trust Departments to provide integrated tax, legal, and investment advice.
- Service as court appointed guardian ad litem for disabled minor child in case involving multimillion dollar trust.
- Representation of individuals and fiduciaries in broad range of matters before probate court, including appointment of conservators and guardians for disabled or elderly family members, allowance of trustees' probate accounts, reformation of trusts, petitions for instruction from court on trustees' fiduciary obligations and petitions to establish and carry-out plans for disabled individuals.

Publications and Presentations

- "Fiduciary Income Taxation," Boston Bar Association New Estate Planner's Division
- "Estate Planning in Light of Family Dynamics and Recent Fiduciary Litigation," Boston Bar Association Estate Planning Division
- "Administration of Estates in Massachusetts," panelist, MCLE
- Various presentations to parent groups and non-profit organizations on special needs planning

Professional & Community Involvement

- Member of the Trusts and Estates Section of the Boston Bar Association
- Member of the Leadership Council and Board of Visitors and a parent spokesperson for the Franciscan Hospital for Children
- Member of the Newton-Wellesley Neighborhood Council
- Member of the Board of Directors for Episcopal City Mission
- Volunteer for the IRS' Voluntary Income Tax Assistance Program and the joint BBA and U.S. military program advising military personnel on estate planning concerns prior to deployment

Education & Credentials

- Boston College Law School, JD (1992) *cum laude*
- Wesleyan University, BA (1987)

Admissions

- Massachusetts