Brian W. Monnich

PARTNER

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Brian Monnich provides clients with sophisticated guidance on a broad array of wealth management matters, helping them to grow and protect their multi-generational estates. He takes a personal approach in advising clients of diverse ages and nationalities and across various industries, developing and implementing estate planning strategies designed to minimize taxes and preserve family wealth.

As his judgement and experience are highly valued by his clients, Brian is often chosen to be trustee for his clients.

Focus Areas

Choate Wealth

Admissions

- Massachusetts

Representative Engagements

- Designed sophisticated wealth transfer strategy to enable owners of private company to transfer significant portion of economic value of company to trusts for descendants free of tax.
- Serves as Trustee of charitable foundation that has developed innovative grantmaking program to fund research for cure of Parkinson's Disease.
- Advised non-U.S. institutional trustee in connection with restructuring of foreign trust to minimize U.S. tax liabilities.
- Assisted family with development of governance structure meant to facilitate management of family wealth over multiple generations.
- Counsels numerous clients in formulating customized trust provisions intended to offer economic benefits and protection to children without affecting their motivation to lead productive and fulfilling lives.

Professional & Community Involvement

- Member, The Society of Trusts and Estates Practitioners (STEP)
- Active Volunteer, Trustees of Reservations
- Former Co-Chair, Choate's Wealth Management Practice
- Former foreign language teacher at Tabor Academy in Marion, Massachusetts and the Landon School in Bethesda, Maryland