

Charles A. Cheever

CO-MANAGING PARTNER

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Charles Cheever leads the Firm as Co-Managing Partner. Charles helps high net worth clients manage their estate planning, tax, and investment responsibilities so that they can achieve their financial goals. He has a particular focus on helping search fund investors and entrepreneurs with the estate planning and tax strategies unique to this industry. Charles works deliberately to get to know his clients and their families personally in order to provide advice that is independent and focused exclusively on what is best for each client. Charles serves as trustee for more than $1 billion in assets, utilizing the full range of Choate's Family Office Services Group to deliver integrated counsel to his clients.

Charles is a member of the Firm's Executive Committee.

Focus Areas

Choate Wealth

Recognition

- *Best Lawyers in America* (2009-2027)
- *Massachusetts Super Lawyer*

Representative Engagements

- Advised search fund CEOs and investors on QSBS reorganization.
- 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*
- "Practice Management: Trust Solves a $30 Million Problem," featured, *The Wall Street Journal*

Charles speaks regularly on estate planning and wealth management strategies throughout Massachusetts.

Professional & Community Involvement

- Member, American Bar Association
- Member, Boston Bar Association

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Education & Credentials

- University of Virginia School of Law, JD (1995)
- Harvard University, BA (1990)

Admissions

- Massachusetts