



Courtney N. Carr

PARTNER

617-248-5225

ccarr@choate.com

Courtney Carr provides comprehensive and personalized estate planning advice to high net worth individuals and their families to help them grow and protect multi-generational wealth. She specializes in developing customized estate plans for clients designed to minimize estate, gift and generation-skipping transfer taxes, and to meet each client's personal goals for wealth transfer.

Courtney invests in each client relationship and makes it a priority to personally get to know her clients and their families in order to provide the best advice and service to each of them. She works closely with her colleagues in the Wealth Management Group to provide integrated, customized family office services designed to meet the specific needs of each client family. These services include trust administration, investment management advice through Choate Investment Advisors, income and gift tax advice, and tax return preparation.

Focus Areas
Choate Wealth

Admissions

- Massachusetts
- U.S. Court of Appeals, First Circuit
- U.S. District Court, Massachusetts

Representative Engagements

- Regularly counsels clients on sophisticated strategies for lifetime asset transfer, including irrevocable trusts that benefit multiple generations of descendants, grantor retained annuity trusts ("GRATs"), qualified personal residence trusts ("QPRTs"), and family limited liability companies.
- Educates younger generations of families about estate planning, charitable giving, trusts, and wealth preservation, and helps facilitate discussions on such topics among members of multi-generational families.
- Represents lottery winners in connection with estate and financial planning and the unique challenges associated with winning.
- Assists families develop mission statements and guidance for family governance and wealth stewardship.

Professional & Community Involvement

- Member of the Massachusetts Bar Association
- Member of the Boston Bar Association
- Member of the board of trustees of Worcester Academy, an independent school in Massachusetts

