



Kimberly E. Cohen

PARTNER

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Kimberly Cohen is known for her strategic planning advice and extensive estate planning experience. Kim regularly counsels entrepreneurs, partners of private equity firms, venture capitalists, private and public company officers and shareholders, and high net worth individuals and families in the development and implementation of sophisticated planning techniques to aid with the accumulation, preservation, and transfer of wealth. She has particular experience working with private equity and hedge fund clients in the Boston and New York regions.

In addition, Kim serves as a trustee for many family trusts and helps clients achieve their philanthropic goals through vehicles such as private foundations, charitable remainder and lead trusts, and charitable gift annuities.

Kim is also a frequent lecturer on new developments in the estate planning area including at the Heckerling Institute on Estate Planning, The American College of Trust and Estate Counsel (ACTEC) Annual Meeting, and The American Law Institute Awards.

Focus Areas

Choate Wealth

Recognition

- *The Best Lawyers in America* Trusts and Estates "Lawyer of the Year" (2023)
- *Boston Magazine* "Top Lawyers" (2021-2022)
- *Chambers High Net Worth USA Private Wealth Law: Eastern Region* (2019-2025)
- *Chambers High Net Worth* (2016-2025)
- *Chambers USA* (2011-2020)
- *Best Lawyers in America* (2015-2026)
- *Massachusetts Super Lawyers*

Publications and Presentations

- Advanced Estate Planning Practice Updates, *panelist*, American Law Institute Continuing Legal Education triannual national webcasts, 2019.
- "GST Exemption a Victim of 'Sloppy Drafting,' but It May Not Matter," *quoted*, *Tax Analysts*, March 16, 2018.
- "Hot Topics," *co-presenter*, ACTEC National Meeting, San Antonio, Texas, March 2018.
- "New Inflation Adjustment May Complicate Estate Planning," *quoted*, *Tax Analysts*, February 7, 2018.
- "Guidance Plan Placement May Signal Estate Project Course Change," *quoted*, *Tax Analysts*, February 7, 2018.

- "Advanced Estate Planning Practice Updates," *panelist*, American Law Institute Continuing Legal Education triannual national webcasts, 2018.

Professional & Community Involvement

- Chair of Estate and Gift Tax Committee, ACTEC
- Member of Professional Advisors Committee at the Boston Foundation

Education & Credentials

- Cornell Law School, JD (1997) *magna cum laude*, Order of the Coif
- Dartmouth College, BA (1994) *with honors*

Admissions

- Massachusetts
- New York