

Rachel Y. Meagher

PRINCIPAL

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Rachel Meagher advises high net worth families and individuals on all aspects of their estate plans, including both tax and non-tax considerations. Her practice includes administration of trusts and estates, inter-generational planning and sophisticated wealth transfer techniques.

Rachel enjoys working closely with her clients to ascertain their individual goals and concerns, and brings her years of experience in trusts and estates to identify and implement practical, tax-efficient solutions.

Focus Areas

Choate Wealth

Representative Engagements

- Design and implement strategies for modifying the terms of existing irrevocable trusts, including trust "decantings" and out-of-court settlement agreements.
- Advise clients on sophisticated strategies for lifetime asset transfers, including spousal lifetime access trusts (SLATs), multi-generational irrevocable trusts, grantor retained annuity trusts (GRATs), qualified personal residence trusts (QPRTs), family limited liability companies, sales to grantor trusts, life insurance trusts and other tax-advantaged strategies.

Publications and Presentations

- "Planning for Life's Transitions," speaker, Harvard Business School Association of Boston webinar, March 2026
- "Estate Planning in 2025: Sweet Dreams or Tossing and Turning?" panelist, Harvard Law School Fall Reunion, October 2025
- "Beyond the Numbers: Legal Strategies Advisors Should Know for Major Life Events," speaker, Women & Finance Knowledge Circle, Financial Planning Association, October 2025
- "With this ring…and prenup…I thee wed," speaker, Harvard Business School Women's Leadership Summit, November 2024
- "Schedule L of Form 706 – Net Losses During Administration," co-author, Preparing Fiduciary Income, Gift, and Estate Tax Returns, MCLE, 2022

Education & Credentials

- Harvard Law School, JD (2011) *cum laude*
- Wesleyan University, BA (2006) *with honors*

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Admissions

- Massachusetts
- New York