

Joshua Simon

Senior Associate

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Overview

Joshua Simon assists individuals and families with all aspects of estate planning and trust and estate administration. He counsels clients throughout Rhode Island and Massachusetts in the use of sophisticated estate planning techniques to minimize tax consequences and best protect client assets. He also advises executors and trustees with respect to their fiduciary duties and obligations, particularly under Rhode Island law. Additionally, Josh assists clients with needs relating to property owned in Florida, the Florida probate process and specific issues in the context of planning with life insurance.

Education and Credentials

Education

St. Thomas University School of Law, J.D., *summa cum laude*, Valedictorian

University of Miami, B.A.

Admissions

Commonwealth of Massachusetts

State of Rhode Island

State of Florida

Recognition and Community

No aspect of this advertisement has been approved by the highest court of any state. Prior results do not guarantee a similar outcome. See Awards Methodology.

Recognitions

Selected to the list of Providence *Super Lawyers*® Rising Stars, Estate Planning and Probate, 2022-2023

Practices & Industries

Private Client

Residential Real Estate

Tax

Tax Exempt Organizations & Charitable Giving

Trust & Estates

Trust Services and Fiduciary Compliance

Insights

AI Hallucinations: Fake Citations, Real Sanctions
November 12, 2025

In The Media

A Primer on Powers of Attorney
Rhode Island Bar Journal, November/December 2022