February 27, 2026

Amy Lonergan Honored with 2026 Boston Estate Planning Council Excellence Award

Day Pitney LLP is pleased to announce that Boston Partner Amy R. Lonergan has been honored with the 2026 Boston Estate Planning Council (BEPC) Excellence Award, the Council's highest distinction for excellence in the estate planning profession. Lonergan will be formally recognized at the 2026 BEPC Annual Gala on May 21 in Boston.

The BEPC Excellence Award recognizes outstanding contributions to the estate planning profession and is awarded through a competitive annual nomination process. Presented at the BEPC Annual Gala, the award celebrates professionals who exemplify excellence as trusted client advisors, collaborative planners, mentors to emerging professionals, generous educators within the field, and active contributors to the broader community. For more information on the award and its methodology, click here.

“Amy's selection for the BEPC Excellence Award reflects the way she practices every day,” said Gregory A. Hayes, Day Pitney's Managing Partner. “She brings clarity and judgment to some of the most personal and complex decisions her clients face, and she does so with uncommon care. Within the firm and the broader estate planning community, she is the person others turn to—not only for her technical insight, but for her generosity in sharing it. This recognition honors both the standard she sets for her work and the impact she has on the people around her. We are incredibly proud to see her contributions recognized in this way.”

Lonergan serves as the Business Unit Leader for the firm's Private Client Department, where her practice is centered on advising individuals and families on all aspects of estate and transfer tax planning. She regularly crafts sophisticated, tailored strategies to help clients transfer wealth to future generations in a way that reflects their legacy and intentions while minimizing tax exposure, working closely with business owners, entrepreneurs, real estate developers, and private equity and hedge fund principals. In addition to her estate planning work, Lonergan regularly serves as a professional trustee and counsels individuals and financial institutions on matters involving probate, trust administration, estate settlement, and fiduciary litigation.

She has extensive experience in all aspects of complex estate planning, including tax-efficient gifting, asset protection, and the use of entities such as partnerships and LLCs. Her work often incorporates advanced tools like GRATs, QPRTs, installment sales to grantor trusts, life insurance trusts, and charitable remainder trusts.

Actively engaged in both the legal and broader community, Lonergan has twice served on the Board of Directors of the Boston Estate Planning Council. She is a Fellow of the American College of Trust and Estate Counsel (ACTEC) and a member of Day Pitney's Executive Board. Lonergan is also the current Vice Chair of the Malden Catholic Board of Trustees, the first woman to serve in that role in over 90 years.

She earned her J.D., *cum laude*, from Suffolk University Law School and is admitted to practice in Massachusetts and New Hampshire.

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

Key Contacts



Amy R. Lonergan

Partner

Boston, MA | (617) 345-4613

alonergan@daypitney.com