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Amy R. Lonergan

A Trusted Family Advisor

Day Pitney partner Amy Lonergan was not planning to be a lawyer. In fact, she started her career with an investment firm in lower Manhattan. On September 11, 2001, her office was located in a building connected to the twin towers. The events of that morning changed everything.

Following the attacks, Lonergan found comfort in the steady hand of the American legal system, and she was inspired to enroll in law school. It was there that a course in gift and estate taxes ignited her interest in the legal field of trusts and estates. "What resonated most with me was the opportunity to use sophisticated financial concepts to assist individuals and their families with their tax and generational planning," said Lonergan, who now works extensively in the areas of estate and tax planning, transfers of wealth and estate administration.

Lonergan finds that being successful in her work as a trusted family advisor is sometimes more about understanding the complex dynamics within a family than it is about tax exposure. Clients appreciate that Lonergan understands what is most important to them, especially in complicated matters.

"She listens, she processes and she works efficiently to meet the clients' expectations," said Robert G. Bannish, professional fiduciary and President of Rice, Heard & Bigelow, Inc. "While these may appear to be simple qualities, they are absolutely essential to a client, and they are rare in my experience with estate planning attorneys across the country."

Lonergan recently represented Bannish in a large and complex estate settlement matter with diverse and unusual assets. "Amy was outstanding," Bannish said. "I have continued to engage her for several other matters, and I have recommended her to my best clients."

Clients appreciate Lonergan's understanding of the importance of working within a team and delegating as necessary. "She knows how to manage her clients and her colleagues to achieve the expected outcomes," Bannish said.

Lonergan credits the development of her many talents to prior life experiences. Early on, she learned about teamwork, research and preparation when she was on a winning debate team in high school. Her financial services career also influenced her style of client service. According to Lonergan, "I always try to understand what's most important to the clients and approach it from their perspective."

When she's not assisting clients with their tax and estate planning needs, Lonergan enjoys spending time with her husband and two daughters, and volunteering. She has participated in several pro bono clinics to provide free wills for veterans and members of the armed forces. Lonergan also currently serves on the Board of Directors of the Boston Estate Planning Council and is a member of the Professional Advisors Committee of The Boston Foundation.

TRUSTS AND ESTATES

Suffolk University Law School, J.D., cum laude, 2006

Baruch College, B.B.A., cum laude, 2003

Admission: Massachusetts

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