



## Amy Lonergan

*Partner*

*Boston, MA*

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### OVERVIEW

Amy Lonergan serves as the Business Unit Leader for the Private Client Department, and assists individuals and families in all aspects of estate and transfer tax planning. Her practice focuses on developing complex plans that incorporate sophisticated strategies to transfer wealth to the next generation in a manner consistent with the client's legacy and intentions, while also minimizing taxes. She is particularly skilled at advising business owners, entrepreneurs, real estate developers and principals of private equity and hedge funds in all aspects of estate planning and wealth transfer strategies. Amy regularly serves as a professional trustee of private trusts, counsels individuals and financial institutions regarding probate and trust administration issues, and advises on all matters related to probate, estate settlement and fiduciary litigation. Amy also assists tax-exempt and charitable organizations regarding formation, obtaining tax-exempt status, reporting and operational requirements.

Amy has extensive experience in all aspects of complex estate planning, including:

- Gift, estate and generation-skipping transfer tax planning
- Asset protection planning for clients and their family members
- Limited liability companies and partnerships
- Grantor retained annuity trusts (GRATs)
- Qualified personal residence trusts (QPRTs)
- Installment sales to grantor trusts
- Structuring asset transfers to maximize valuation discounts
- Life insurance trusts
- Charitable remainder trusts
- Private foundations, public charities
- Modifying irrevocable trusts through judicial proceedings and nonjudicial settlement agreements

Amy is actively involved in the community and legal industry. She has held several leadership

positions with the Boston Estate Planning Council and the Trusts & Estates Section of the Boston Bar Association. Amy is also a member of the firm's Executive Board.

## SERVICES

**FAMILY OFFICE**

**INTERNATIONAL TRUSTS AND ESTATES**

**FIDUCIARY AND PROBATE LITIGATION**

**TRUST SERVICES AND FIDUCIARY COMPLIANCE**

**TRUSTS AND ESTATES**

**PRIVATE CLIENT**

## INDUSTRIES

**TAX-EXEMPT ORGANIZATIONS AND CHARITABLE GIVING**

## INSIGHTS

**"ESTATE PLANNING: MCLE: BASICSPLUS!," MASSACHUSETTS CONTINUING LEGAL EDUCATION NEW ENGLAND CHAPTER**

Presenter, May 22, 2023, Massachusetts Continuing Legal Education New England Chapter

**COVID-19 & ELECTION YEAR WEALTH TRANSFER STRATEGIES**

Speaker, October 21, 2020

**WILLS FOR VETERANS**

Volunteer, November 8, 2018, Day Pitney LLP, Boston, MA

**INVESTING IN ART**

Panelist, October 17, 2018, Family Office Investing Series, Downtown Harvard Club of Boston, Boston, MA

**52ND ANNUAL HECKERLING INSTITUTE RECAP**

Presenter, February 28, 2018, Boston Estate Planning Council

## NEWS

**CHAMBERS HIGH NET WORTH RECOGNIZES 20 DAY PITNEY ATTORNEYS FOR PRIVATE WEALTH LAW**

Featured, July 20, 2023, *Day Pitney Press Release*

### **NEW LEADERSHIP ANNOUNCED AT DAY PITNEY**

Mentioned, April 4, 2023, *New Jersey Law Journal*

### **GREGORY A. HAYES NAMED MANAGING PARTNER OF DAY PITNEY**

Mentioned, April 3, 2023, *Day Pitney Press Release*

### **BOSTON MAGAZINE'S TOP LAWYERS OF 2022**

Featured, November 29, 2022, *Boston magazine*

### **CHAMBERS HIGH NET WORTH RECOGNIZES 20 DAY PITNEY ATTORNEYS FOR PRIVATE WEALTH LAW**

Featured, July 22, 2022, *Day Pitney Press Release*

## **EDUCATION AND CREDENTIALS**

### **EDUCATION**

Suffolk University Law School, J.D., TEST

Baruch College, B.B.A., TEST

### **ADMISSIONS**

Commonwealth of Massachusetts

State of New Hampshire

### **AFFILIATIONS**

Boston Estate Planning Council

The Boston Foundation

Boston Bar Association

Women's Bar Association

Trusts and Estates Consortium

Boston Probate and Estate Planning Forum

## **RECOGNITION AND COMMUNITY**

### **RECOGNITION**

Chosen for inclusion in list of Top Lawyers for Trusts and Estates by *Boston Magazine* (Metro Corp.),

2021-2022

Chosen for inclusion in *Chambers HNW Guide* (Chambers & Partners) of recognized practitioners for Private Wealth in Massachusetts, 2021-2023

Chosen for inclusion in *The Best Lawyers in America* (Woodward/White, Inc.), Trusts and Estates, 2021-2024

Selected to the list of Massachusetts Women's Edition *Super Lawyers Rising Stars*, (Thomson Reuters), Estate Planning and Probate, 2017

Selected to the list of Massachusetts *Super Lawyers Rising Stars*, (Thomson Reuters), Estate Planning and Probate, 2012-2016

*No aspect of these advertisements has been approved by the highest court of any state. See [Awards Methodology](#).*

## COMMUNITY

Malden Catholic High School, Board of Trustees, 2018-Present