



## Barbara Wand

*Of Counsel*

*Boston, MA*

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### OVERVIEW

Barbara Wand advises individuals, families and businesses on sophisticated estate planning and the development and implementation of philanthropic goals. She counsels private foundations and public charities on governance, compliance and planned giving programs. Barbara assists clients with estate and trust administration and serves as executor and trustee. She is certified as an Accredited Estate Planner (AEP) by the National Association of Estate Planners & Councils ®.

Barbara, a fellow of the American College of Trust and Estate Counsel, has extensive experience in all aspects of estate planning, including:

- Lifetime and charitable giving
- Family business planning
- International estate planning
- Estate planning for entrepreneurs, hedge fund principals and executives
- Integrating employee benefits into estate plans
- Advising businesses on strategic philanthropy
- Counseling private foundations and public charities on strategy, governance and compliance

She also has significant experience in trusteeship and the administration of trusts. This area of focus encompasses:

- Charitable trusts
- Insurance trusts
- Revocable trusts
- Testamentary trusts
- Private foundations

Barbara has been recognized as a leading lawyer in estate planning by Chambers & Partners every

year from 2010 through 2018 (*Chambers USA*, 2010-2016, and *Chambers HNW*, 2016-2018).<sup>\*</sup> In 2011, Chambers wrote that Barbara is "renowned for her ability to combine her complete grasp of professional knowledge with an understanding of what's most important to her clients in order to develop solutions perfectly tailored to them."

In 2016, Barbara was selected as the sole recipient of the Excellence Award by the Boston Estate Planning Council, an organization of over 700 members. She was also named a Top Woman of Law by *Massachusetts Lawyers Weekly* (Bridgetower Media)<sup>\*</sup> for her accomplishments in the legal field as a pioneer, trailblazer and role model. She has been selected for inclusion in the trusts and estates law sections of *The Best Lawyers in America* (Woodward/White, Inc.)<sup>\*</sup> since 2003, and as a Massachusetts *Super Lawyers* (Thomson Reuters)<sup>\*</sup> for over 10 years. She was also chosen as one of the top 50 women lawyers in Massachusetts in the November 2006 issue of *Boston* magazine. In 2017, Barbara was named in list of "Women Worth Watching" by *Profiles in Diversity Journal*.

*<sup>\*</sup>No aspect of these advertisements has been approved by the highest court of any state. See Awards Methodology.*

## SERVICES

### FAMILY OFFICE

### INTERNATIONAL TRUSTS AND ESTATES

### TRUST SERVICES AND FIDUCIARY COMPLIANCE

### TRUSTS AND ESTATES

### PRIVATE CLIENT

## INDUSTRIES

### TAX-EXEMPT ORGANIZATIONS AND CHARITABLE GIVING

## INSIGHTS

### THE PHILANTHROPY TALK: HOW DO I DO IT...AND WHY DO I HAVE TO?

Speaker, December 11, 2018, The Boston Foundation, Boston, MA

### THE POWER OF WOMEN WITH WEALTH

Moderator, October 3, 2018, Day Pitney LLP and the Association of Corporate Counsel (ACC), Northeast Chapter ? Women's Initiative, Boston, MA

### CROSS CUTTING PERSPECTIVES ON PHILANTHROPY

Speaker, May 8, 2018, Boston Estate Planning Council, Massachusetts

## NEWS

### **DAY PITNEY BOSTON OFFICE HOSTS CLIENT HOLIDAY EVENT AT WANG THEATRE**

Mentioned, November 29, 2023, *Day Pitney Press Release*

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

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

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

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

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

Featured, July 26, 2021, *Day Pitney Press Release*

### **CHAMBERS HIGH NET WORTH RECOGNIZES DAY PITNEY AND 16 ATTORNEYS FOR PRIVATE WEALTH LAW**

Featured, July 10, 2020, *Day Pitney Press Release*

## EDUCATION AND CREDENTIALS

### EDUCATION

Brandeis University, B.A., TEST

Indiana University School of Law/Bloomington, J.D., TEST

### ADMISSIONS

Commonwealth of Massachusetts

State of New York

### AFFILIATIONS

Professional Advisors Committee

American College of Trust and Estate Counsel (ACTEC)

Boston Probate and Estate Planning Forum

Boston Estate Planning Council

Massachusetts Bar Association

Boston Bar Association

Massachusetts Women's Bar Association  
Former Visiting Associate Professor of Law  
Former Assistant Professor of Law

## RECOGNITION AND COMMUNITY

### RECOGNITION

Chosen for inclusion in *Chambers HNW Guide* (Chambers & Partners) as a leading lawyer for wealthy individuals and families in Massachusetts, 2016-2023

Chosen for inclusion in the *Chambers USA Legal Directory* (Chambers & Partners) as a leading estate planning attorney in Massachusetts, 2010-2016

Chosen for inclusion in *The Best Lawyers in America* (Woodward/White, Inc) for Trusts and Estates, 2003-2024

Honored as a "Woman Worth Watching" by the *Profiles in Diversity Journal*, 2017

Recipient of the *Excellence Award* from the Boston Estate Planning Council, 2016

Selected to the list of Massachusetts Women's Edition *Super Lawyers* (Thomson Reuters), Estate Planning and Probate 2017-2019

Selected to the list of Massachusetts *Super Lawyers*, (Thomson Reuters), Estate Planning and Probate, Nonprofit Organizations 2004-2013, 2015-2020

Named a "Top Woman of Law" by *Massachusetts Lawyers Weekly* (Bridgetower Media)\*, 2015

Named one of the "Top 50 Women Lawyers" in Massachusetts by *Boston* magazine (Metro Corp.), 2006

Certified Accredited Estate Planner® (AEP®)

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