



## David S. Raymon

*Partner*

*Boston, MA*

*T: (617) 345 4689*

*F: (617) 849 7222*

*[draymon@daypitney.com](mailto:draymon@daypitney.com) vCard in*

## OVERVIEW

David "Dave" Raymon focuses his practice on estate planning, estate and trust administration, and issues that arise in the context of trusts and estates. He assists families with estate settlement, guides them through estate and trust related disputes, and serves as independent trustee. As an attorney and certified public accountant (CPA), Dave is able to advise his clients on the tax and non-tax aspects of trusts and estates.

Dave helps clients organize their estates to provide for the smooth and tax-efficient transfer of assets while minimizing exposure to creditors. He counsels clients on complex gifting transactions, charitable giving, business succession planning, and the establishment of multi-generational trusts. As independent trustee, Dave helps manage and preserve family wealth. He also represents clients in fiduciary litigation including will contests and fiduciary duty actions.

## SERVICES

**PRIVATE CLIENT**

**TRUSTS AND ESTATES**

**FIDUCIARY AND PROBATE LITIGATION**

**TAX**

## INDUSTRIES

**TAX-EXEMPT ORGANIZATIONS AND CHARITABLE GIVING**

## INSIGHTS

### CHECKLIST FOR FAMILY BUSINESS SUCCESSION PLANNING

Panelist, February 2022, MCLE Webcast

### BUILD YOUR NOMINEE TRUST KNOWLEDGE

Speaker, June 2021, The Real Estate Bar Association of Massachusetts

### DIVORCE AND THE MARITAL HOME: PRENUPTIAL/POSTNUPTIAL REAL ESTATE PLANNING

Speaker, June 2021, The Real Estate Bar Association of Massachusetts

### PROTECTING REAL ESTATE (AND OTHER ASSETS) IN MARRIAGE AND DIVORCE USING TRUSTS

Speaker, May 2021, The Real Estate Bar Association of Massachusetts

### FINANCIAL EXPLOITATION AND UNDUE INFLUENCE ISSUES AFFECTING REAL ESTATE CONVEYANCING

Speaker, April 2021, The Real Estate Bar Association of Massachusetts

## NEWS

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

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

### NEW ASSOCIATIONS

Featured, July 7, 2023, *Massachusetts Lawyers Weekly*

### DAY PITNEY ADDS 4 EX-BURNS & LEVINSON ATTYS IN BOSTON

Featured, June 5, 2023, *Law360*

### DAY PITNEY ADDS FOUR LATERAL PARTNERS, SOLIDIFYING FIRM AS ONE OF THE LARGEST PRIVATE CLIENT TEAMS IN BOSTON

Featured, June 1, 2023, *Day Pitney Press Release*

### FOR THE RECORD: COMMON ESTATE PLANNING MISTAKES

Featured, March 2020, *Radio Entrepreneurs*

## EDUCATION AND CREDENTIALS

### EDUCATION

Suffolk University Law School, J.D., 2008

Emory University, Goizueta Business School, B.B.A., 2003

## ADMISSIONS

State of Rhode Island

Commonwealth of Massachusetts

## AFFILIATIONS

Boston Estate Planning Council

The Boston Foundation

Real Estate Bar Association

## RECOGNITION AND COMMUNITY

### RECOGNITION

*No aspect of these advertisements has been approved by the highest court of any state. See **Awards Methodology**.*

Selected to the list of Massachusetts **Super Lawyers** Rising Stars (Thomson Reuters), Estate Planning and Probate, 2016-2018

*No aspect of these advertisements have been approved by the highest court of any state. See **Awards Methodology**.*