



## David Raymon

*Partner*

*Boston, MA*

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### 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 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**

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](#).*