



Heidi Seely

Partner

Boston, MA

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OVERVIEW

Heidi Seely assists families and individuals in all aspects of the broader trusts & estates practice, with a focus on the personal and family relationships at the core of each plan. Heidi has extensive experience in planning for and implementing sophisticated yet understandable strategies to transfer wealth between generations while minimizing tax obligations. She also skillfully supports individuals and fiduciaries in navigating complex estate settlements, including all related asset marshaling, tax return preparation, and management of distributions. In addition, she provides a personal touch in advising on trust matters and regularly serves as a professional trustee of private trusts.

Heidi frequently speaks on all matters relating to her practice and is co-author of *The Boston Trustee: The Lives, Laws and Legacy of a Vital Institution*. She has been an active member of the Boston Bar Association for more than 10 years and was honored to serve as co-chair of its Trusts & Estates Section.

SERVICES

TRUSTS AND ESTATES

FIDUCIARY AND PROBATE LITIGATION

TRUST SERVICES AND FIDUCIARY COMPLIANCE

PRIVATE CLIENT

INSIGHTS

"HECKERLING RECAP WEBINAR: PANEL DISCUSSION", BOSTON ESTATE PLANNING

COUNCIL

Presenter, February 29, 2024, Webinar hosted by BEPC

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

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

"MUST-KNOW STRATEGIES IN ESTATE PLANNING 2023," JAY DARBY'S TAX BRIEFINGS

Speaker, May 16, 2023, Boston, MA, Jay Darby's Tax Briefings

"2023 HECKERLING RECAP: PANEL DISCUSSION," BOSTON ESTATE PLANNING COUNCIL

Speaker, February 27, 2023, Boston Estate Planning Council

"PROTECTING YOUR WEALTH," FIDELITY WEALTH MANAGEMENT WEBINAR

Presenter, March 10, 2022, "Protecting Your Wealth," hosted by Fidelity Wealth Management Webinar

NEWS

DAY PITNEY ELECTS FOUR NEW PARTNERS

Featured, January 2, 2024, *Day Pitney Press Release*

DAY PITNEY ELECTS FOUR NEW PARTNERS

Featured, January 2, 2024, *Attorney At Law Magazine*

HEIDI SEELY NOMINATED TO THE BOSTON FOUNDATION'S PROFESSIONAL ADVISORS NETWORK

Featured, June 13, 2023, *Day Pitney Press Release*

COVID-19 PANDEMIC HAS ELDER LAW BAR ON SPEED-DIAL

Quoted, April 15, 2020, *Massachusetts Lawyers Weekly*

EDUCATION AND CREDENTIALS

EDUCATION

Santa Clara University, B.A., 2003

Suffolk University Law School, J.D.

ADMISSIONS

Commonwealth of Massachusetts

State of California

AFFILIATIONS

Boston Foundation Professional Advisors Network

Boston Bar Association

Boston Bar Association

Boston Bar Association

Boston Bar Association

Boston Estate Planning Committee

Greater Boston Fiduciary American Inn of Court

RECOGNITION AND COMMUNITY

RECOGNITION

Selected to the list of Massachusetts *Super Lawyers* Rising Stars (Thomson Reuters), Estate Planning & Probate, 2015-2020

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