



Heidi Seely

Counsel

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OVERVIEW

Heidi Seely assists individuals and families in all aspects of estate planning, estate administration and trust administration. She has successfully supported individuals and fiduciaries in navigating complex estate administrations, and provides a personal touch in advising in trust matters. Heidi is skilled in planning for and implementing sophisticated, yet understandable, strategies to transfer wealth between generations while minimizing tax obligations.

Heidi also serves as counsel in probate litigation matters, applying her experience in trusts and estates law to matters before the Probate and Family Court.

SERVICES

TRUSTS AND ESTATES

FIDUCIARY AND PROBATE LITIGATION

TRUST SERVICES AND FIDUCIARY COMPLIANCE

PRIVATE CLIENT

INSIGHTS

"PROTECTING YOUR WEALTH," FIDELITY WEALTH MANAGEMENT WEBINAR

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

"BOSTON PRACTICE GROUP: ESTATE PLANNING – PRACTICAL SUGGESTIONS FOR

ADVISORS & THEIR CLIENTS," FINANCIAL PLANNING ASSOCIATION

Speaker, October 28, 2021, "Boston Practice Group: Estate Planning – Practical Suggestions for Advisors & Their Clients," hosted by Financial Planning Association

"ESTATE PLANNING: MCLE BASICSPLUS, INITIAL STEPS, FUNDAMENTALS AND ESTATE PLANNING DOCUMENTS," MCLE

Presenter, August 2, 2021, "Estate Planning: MCLE BasicsPLUS, Initial Steps, Fundamentals and Estate Planning Documents," Hosted by the MCLE

BOSTON BAR ASSOCIATION TRUSTS & ESTATES SECTION MID-YEAR REVIEW WEBINAR

Speaker, January 19, 2021

TRUSTS AND ESTATES END OF YEAR REVIEW 2020

Speaker, June 8, 2020, Boston Bar Association, Hosted Event

NEWS

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 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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