



## Jaclyn O'Leary

*Partner*

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## OVERVIEW

Jaclyn O'Leary's practice focuses in the areas of estate planning and estate and trust administration. She works with clients to implement comprehensive estate plans, and guides clients through estate administration, addressing any complex estate, trust, probate and tax matters that may arise in the process.

In addition, Jaclyn works with multi-generational families in administering family trusts and facilitating related transactions. Jaclyn also has experience advising clients as to the disclosure of previously unreported foreign financial accounts and entities to the U.S. government, as well as ensuring future compliance with U.S. tax laws in relation to such accounts and entities.

## SERVICES

**FIDUCIARY AND PROBATE LITIGATION**

**TRUST SERVICES AND FIDUCIARY COMPLIANCE**

**TRUSTS AND ESTATES**

**PRIVATE CLIENT**

## INDUSTRIES

**TAX-EXEMPT ORGANIZATIONS AND CHARITABLE GIVING**

## INSIGHTS

### LIFETIME PLANNING ON DEATH'S DOOR, ROUNDTABLE BREAKFAST, BOSTON ESTATE PLANNING COUNCIL

Speaker, June 3, 2020

### COVID-19: MASSACHUSETTS APPROVES TEMPORARY REMOTE NOTARIZATION

Co-author, May 7, 2020, *Day Pitney Advisory*

### A LIFETIME OF ESTATE PLANNING: BASIC ESTATE PLANNING AT VARIOUS STAGES OF LIFE, 2019 ALL CPAS YEAR-END NETWORKING SEMINAR

Speaker, December 4, 2019

### PROBATE PROCESS

Speaker, March 19, 2018, Trusts & Estates, Suffolk University, Boston

### LIFETIME PLANNING ON DEATH'S DOOR

Speaker, February 24, 2017, Trusts & Estates Section and Estate Planning Committee of the Boston Bar Association, Boston

## NEWS

### DAY PITNEY'S BOSTON OFFICE SELECTED FOR INAUGURAL EMPOWERING WOMEN AWARDS LIST

Quoted, July 31, 2023, *Day Pitney Press Release*

### BOSTON MAGAZINE'S TOP LAWYERS OF 2022

Featured, November 29, 2022, *Boston magazine*

### BOSTON MAGAZINE'S TOP LAWYERS OF 2021

Featured, November 23, 2021, *Boston Magazine*

### DAY PITNEY PROMOTES FIVE NEW PARTNERS

Featured, January 2, 2020, *Day Pitney Press Release*

### 87 DAY PITNEY LAWYERS NAMED TO 2016 SUPER LAWYERS LIST

Featured, November 10, 2016, *Day Pitney Press Release*

## EDUCATION AND CREDENTIALS

### EDUCATION

Suffolk University Law School, J.D., 2010

Boston College, B.A., 2004

## ADMISSIONS

Commonwealth of Massachusetts

## AFFILIATIONS

Boston Bar Association

Boston Estate Planning Council

Greater Boston Fiduciary American Inn of Court

The Boston Foundation

## RECOGNITION AND COMMUNITY

### RECOGNITION

Chosen for inclusion in *The Best Lawyers in America* (Woodward/White, Inc.), Trusts and Estates Litigation, 2023-2024, Trusts and Estates, 2023-2024

Chosen for inclusion in list of Top Lawyers for Trusts and Estates by *Boston Magazine* (Metro Corp.), 2021-2022

Selected to the list of Massachusetts Women's Edition *Super Lawyers* Rising Stars (Thomson Reuters), Estate Planning and Probate, 2016-2020

*No aspect of these advertisements has been approved by the highest court of any state. See [Awards Methodology](#).*

### COMMUNITY

Victim Rights Law Center, Boston, MA, volunteer advocating for the rights of victims of rape and sexual violence

Boston Bar Foundation, "Passport to Pairings" Steering Committee Member, volunteer to raise funds and awareness for the public service projects of the Boston Bar Association

Boston Marathon, Dana Farber Marathon Challenge, Team Member, 2017