



Jaclyn O'Leary

Partner

Boston, MA

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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

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*

T&E BAR LOOKS FOR GUIDANCE ON POST-DEATH ACCESS TO DIGITAL ASSETS

Quoted, January 14, 2016, *Massachusetts Lawyers Weekly*

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, Trusts and Estates, 2023

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