DAY PITNEY LLP

Peter Shapland

Of Counsel

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OVERVIEW

Peter Shapland assists clients with all aspects of estate planning, settlement of decedents' estates and administration of family trusts and private foundations. Peter provides a full range of sophisticated income, gift and estate tax planning advice to his clients, but he is also mindful that "the tax tail should not wag the dog." That is, tax planning goals should enhance and not obscure the usually more important goal of effective management and distribution of a family's wealth among its intended beneficiaries. Peter helps his clients implement estate planning arrangements that are always as sophisticated as they need to be but no more complicated than they have to be.

Peter also advises bank trust departments and other professional fiduciaries on a broad range of estate and trust administration issues, including all related income, gift, estate and generation-skipping transfer tax matters. In addition, he has helped fiduciaries resolve difficult questions utilizing provisions of the Massachusetts Uniform Trust Code, including trust modifications and non-judicial settlement agreements.

Peter frequently serves as executor and trustee for his clients and their families. In those capacities, he advises clients on a wide variety of issues, including related income and estate tax planning matters and, more importantly, administering each trust so that it meets the unique needs of the family (or charities) intended to benefit from the trust. Peter also serves as a trustee or advisor of private foundations and has helped these clients achieve a broad variety of charitable planned-giving objectives.

Peter is an active member of both the Boston Bar Association (Trusts and Estates Section) and the Massachusetts Bar Association (Probate Section). He is past co-chair of the Boston Bar Association Trusts and Estates Section, for which he has also served as co-chair of the Trust Administration Committee. He formerly served on the Public Service Committee of the BBA. With the Massachusetts Bar Association, he has served on the Probate Section's governing council. Peter is also a member of the Boston Probate & Estate Planning Forum. He is a former chair of the firm's Trust Services and Fiduciary Compliance practice group and Trust Oversight Committee.

Peter received his B.A. *cum laude* from Tufts University in 1974. He earned a Masters in Public Administration (1979) and his J.D. (1983) from Northeastern University School of Law.

SERVICES

FIDUCIARY AND PROBATE LITIGATION

TRUST SERVICES AND FIDUCIARY COMPLIANCE

TRUSTS AND ESTATES

PRIVATE CLIENT

INSIGHTS

PROBLEMS AND SOLUTIONS IN ALLOCATION OF THE GENERATION-SKIPPING TRANSFER TAX EXEMPTION
Presenter, November 18, 2019, Boston Bar Association, Boston, Massachusetts

TAX AND NON-TAX FACTORS IN SELECTION OF TRUSTEES AND TRUST DISTRIBUTION STANDARDS
Speaker, November 1, 2019, Massachusetts Bar Association?s Seventh Annual Probate Law Conference, Framingham, Massachusetts

LAWYERS AS FIDUCIARIES – DISCUSSION OF ALL THAT A PERSONAL REPRESENTATIVE OR TRUSTEE SHOULD DO (AND SHOULD NOT TRY TO DO)
Panelist, November 9, 2018

WINDING DOWN AND TERMINATION OF ESTATES AND TRUSTS, THE PRACTICAL AND THE ETHICAL
Speaker, November 3, 2017, Massachusetts Bar Association Fifth Annual Probate Conference

TERMINATION OF TRUSTS – STEPS TO BE TAKEN AND THOSE TO AVOID
Speaker, October 25, 2017

EDUCATION AND CREDENTIALS

EDUCATION

Northeastern University, J.D.

Northeastern University, M.P.A.

Tufts University, B.A.

ADMISSIONS

Commonwealth of Massachusetts

AFFILIATIONS

Boston Bar Association

Massachusetts Bar Association

RECOGNITION AND COMMUNITY

RECOGNITION

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

AV Preeminent rated by Martindale-Hubbell

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