

Services & Industries

# Private Client

## OVERVIEW

Day Pitney's lawyers have extensive experience serving the unique needs of individuals and their families, fiduciaries, and tax-exempt entities. We have one of the largest private client practices in the country, and our lawyers collectively have hundreds of years of experience helping our clients plan for the future.

We offer our clients a complete range of services in the following areas:

- Estate planning
- Estate, gift and income tax planning
- Business succession planning
- Estate administration
- Trust administration services
- Guardianships and conservatorships
- Disabilities and special needs planning
- Probate controversies
- International trusts and estates planning
- Tax-exempt organizations and charitable giving
- Art collections and investments

Day Pitney's private client lawyers regularly work in collaboration with our corporate, employment, real estate, trial and environmental lawyers to achieve our clients' individual and business objectives.

## RECOGNITION\*

Named "Law Firm of the Year," in the "Best Law Firms" Trusts and Estates Law category by *U.S. News & World Report* and *Best Lawyers®*, 2021

Named a Finalist for "Legal Team of the Year," by *Family Wealth Report*, 2021

Shortlisted for "Best Law Firm - Estates and Trusts" by *Private Asset Management Awards*, 2021

Shortlisted for "USA Private Client Team of the Year – East Coast," by *Chambers HNW* (Chambers & Partners), 2020

Chambers Shortlisted High Net Worth Awards

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Named "Best Law Firm – Estates and Trusts" by *Private Asset Management*, 2020

2020 PAM Award

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Shortlisted for "Legal Team of the Year," by *Family Wealth Report*, 2019

## Family Wealth Report Awards 2019 Shortlisted

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Named "Law Firm of the Year" by *Family Wealth Report*, 2017

Winner Family Wealth Report Awards 2017

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Finalist in "Accounting, CPA or Law Firms Serving Family Offices" category for Family Wealth Alliance Best in the Industry Awards, 2018

The Family Wealth Alliance

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Shortlisted in two categories, "Best Private Client Law Firm" and "Best Trusts and Estates Division," by Private Asset Management (PAM), 2018

## Private Asset Management Awards 2018 Shortlisted

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Shortlisted in two categories, "Legal Team of the Year" and "Family Wealth Counseling," by *Family Wealth Report*, 2018

## Family Wealth Report New York Awards 2018 Shortlisted

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Named a Family Office "Industry Awards" Finalist by *Wealth Management*

WealthManagement.com 2017

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Ranked as "Highly Commended" in categories for "Best Private Client Law Firm" by Private Asset Management (PAM), 2017, 2019

Private Asset Management Awards - Highly Commended - 2017

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Shortlisted for "Law Firm of the Year" by *Family Wealth Report*, 2016

Shortlisted Family Wealth Report 2016

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Ranked Nationwide, and Band 1 in Private Wealth Law, CT and MA, by *Chambers HNW* (Chambers & Partners), 2016-2020

Ranked Band 1 in Wealth Management, Nationwide, by *Chambers USA* (Chambers & Partners), 2010-2016

Chambers USA 2016

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*\*No aspect of these advertisements have been approved by the Supreme Court of New Jersey. See [Awards Methodology](#).*

## **AFFILIATIONS**

Family Office Association, Resource Council Member

[Family Office Association Member](#)

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## **INSIGHTS**

**["Special Needs Trusts & ABLE Accounts," Amego, Inc.](#)**

July 21, 2022

On July 21, Day Pitney Special Needs Planning Partner Meredith H. Greene presented the webinar titled, "Special Needs Trusts & ABLE Accounts," for Amego, Inc., an organization that supports individuals with Autism Spectrum Disorders and other developmental disabilities throughout their lives.

**"Estate Taxes II: The Marital Deduction, Credit Shelter Planning, and Portability," NYU School of Professional Studies**

July 11, 2022

On July 11, Margaret St. John Meehan presented the session, "Estate Taxes II: The Marital Deduction, Credit Shelter Planning, and Portability," at the Introduction to Trusts and Estates Conference, hosted by NYU School of Professional Studies.

**The Art of Collection Management: Estate Planning for Art Collectors, Artwork Archive**

June 22, 2022

On June 22, Day Pitney Art Law Attorney Melissa A. Passman will be a speaker at the "The Art of Collection Management: Estate Planning for Art Collectors," webinar for the Artwork Archive.

**The Dogs Ate My Kids' Inheritance: Providing for Pets in an Estate Plan**

June 16, 2022

Day Pitney Trusts and Estate Attorneys G. Warren Whitaker and Matthew L. Moore authored the article, "The Dogs Ate My Kids' Inheritance: Providing for Pets in an Estate Plan," for *PLI Chronicle*.

**"Rhode Island Estate Administration From Start to Finish," National Business Institute**

June 29, 2022

On June 29, Day Pitney Trusts and Estates Attorney Leigh Furtado will be presenting at the National Business Institute on, "Rhode Island Estate Administration From Start to Finish."

## **NEWS**

**Top Lawyers 2022; Palm Beach Illustrated**

September 9, 2022

Day Pitney Trusts and Estates Partner Tasha Dickinson and Litigation Partner Michael Napoleone were recognized by the *Palm Beach Illustrated* as "Top Lawyers in 2022," in its September 2022 issue.

**Top Lawyer 2022; Boca Raton Observer**

August 31, 2022

Five Day Pitney Boca Raton Attorneys were recognized by the *Boca Raton Observer* as "Top

Lawyers in 2022."

### **PBN Recognizes 2022 Leaders & Achievers Honorees; Renee Evangelista**

August 19, 2022

The *Providence Business News* selected Renée A. R. Evangelista, a Private Client partner at Day Pitney LLP, as an honoree in its 2022 Leaders & Achievers Awards program. Evangelista, also office managing partner for the firm's Providence office, accepted the honor at the 2022 Leaders & Achievers Ceremony on August 18 at the Aldrich Mansion in Warwick, RI.

### **Day Pitney Boosts Trusts and Estates Practice in Providence**

July 25, 2022

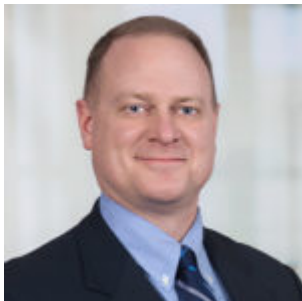
*Day Pitney Press Release*

### **Chambers High Net Worth Recognizes 20 Day Pitney Attorneys for Private Wealth Law**

July 22, 2022

*Day Pitney Press Release*

## **CONTACTS**



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