

# AS SEEN IN *Forbes & Fortune*

**BOSTON** LEADERS IN LAW

## Transcending Generations

Squillace & Associates, P.C.'s tax and estate planning capabilities secure the firm's continued preeminence in Boston's legal community.



FROM LEFT TO RIGHT: SCOTT E. SQUILLACE, PRINCIPAL, PARTNER; BRETT BARTHELMEH, PARTNER; HEATHER REID, PARTNER; AND BRIAN OLSON, PARTNER, GENERAL COUNSEL.

Founded in 2008 by Scott E. Squillace, Esq., AEP®, Squillace & Associates, P.C. is among the top 5% of firms nationwide. “Our entire staff shares a commitment to highly personalized client services,” says Squillace, a celebrated member of the Boston legal community and Fellow of The American College of Trust and Estate Counsel, who specializes in estate and tax planning matters, including international business and philanthropic planning.

Among the firm’s vetted team of top professionals is perennial Massachusetts Super Lawyers® Rising Star Brett Barthelme, Esq., AEP®, who believes the combination of top-tier talent and a commitment to staying small fuels the firm’s success.

“The personal issues we handle require a strong sense of trust between lawyer and client,” says Barthelme, partner. “Scott’s decision to select highly qualified professionals who are dedicated to service distinguishes us from large practices and sets our standard going forward.”

Highly qualified to navigate complexity, the firm serves individuals and families whose personal concerns are often intertwined with their business. Many clients are high net worth individuals who appreciate being guided through estate planning, and later streamlining the postmortem settlement process. These clients also require strategic planning around tax and wealth management issues. As trust builds, more families depend on the firm for tax strategies, succession planning, and trustee services.

Through concierge-style service and caring, skillful practitioners,

Squillace & Associates has gained many repeat clientele, including second and third generations of those the team has assisted in the past. “It’s rewarding to administer plans we helped families create decades ago,” says Heather Reid, Esq., partner, who was a trust administrator for a large bank before becoming an attorney. It is especially beneficial when walking grieving individuals through the probate settlement process. “When someone passes or is unable to speak for themselves, we know what bills need to be paid, understand their family goals, and how to ensure their legacy is preserved and protected.”

### BEYOND THE ORDINARY

When a widow relocated to Massachusetts, her adult son contacted Squillace & Associates about updating her estate plan. The firm collaborated as a team with her former attorney, accountant, and investment managers to create a company to manage her significant art collection, support the valuation of the assets for insurance purposes and tax mitigation, and negotiate contracts for loaning out certain works.

“Our endgame was to permit the family to manage the estate tax liability that heirloom assets may create in a way that prevents or mitigates a forced sale,” explains Barthelme.

“We want our clients to be both satisfied with the outcome and happy with the service we provided,” concludes Squillace, a recognized authority on the legal challenges of same-sex couples and members of the LGBTQ+ community. “Ultimately, our goal is to provide clients with the peace of mind that their important affairs are in order.”

**SQUILLACE**  
& ASSOCIATES, P.C.

20 Park Plaza, Suite 1115 | Boston, MA 02116 | 617-716-0300 | squillace-law.com