

Robert J. Morrill

PARTNER

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Bob is an estate planning, trust and estate administration, and trust and estate dispute resolution lawyer. Throughout his practice, Bob strives to treat his clients as he would want someone he cares about to be treated by a lawyer. Bob's clients rely on his ability to explain complicated legal issues in plain English. Bob's practical advice and creative problem-solving are the cornerstones of his practice. Bob served as the Firm's Managing Partner for 14 years, and led the Firm's successful growth of and transition to the next generation of trust and estate professionals.

REPRESENTATIVE EXPERIENCE

- Bob works with individuals and families from all backgrounds to address important tax and non-tax issues in their estate planning. Planning for possible lifetime incapacity and for the orderly transition of assets at death present myriad issues that must be addressed effectively. Some issues are technical, such as reducing exposure to estate taxes and finding efficient ways to transfer wealth during life. Others are more personal, such as addressing a client's concerns about a special needs child or other issues facing a loved one. Whatever the situation, Bob understands it is critical to listen first, identify the concerns and then advise on their options to address the full range of issues.
- While many complicated legal issues must be identified and addressed in estate administration, Bob understands an equally important part of his role is acting as a caring guide through what is typically a foreign and emotionally difficult process. Teaming up with a group of skilled and experienced paralegals, Bob makes sure all issues are addressed thoroughly and in an efficient manner.
- When assisting with trust administration, Bob counsels trustees and beneficiaries on their respective rights and duties. This typically requires bringing a wide range of skills and knowledge to the situation. Understanding the terms of the trust, the law applicable to those terms and the need to foster open and meaningful interactions between the trustees and beneficiaries is key. Bob has also handled a wide range of court actions seeking instructions on ambiguous trusts and modification of defective trusts.



ROBERT J. MORRILL

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Related Practices

- Estate Planning
- Estate Administration
- Fiduciary Counseling
- Trust Administration

Admissions

- Commonwealth of Massachusetts, 1998

Education

- New England School of Law, J.D., summa cum laude, first in class, 1998
- Keene State College, B.A., 1990

Professional & Community Involvement

- Massachusetts Supreme Judicial Court, Law Clerk to Justice Roderick L. Ireland, 1998-1999
- American College of Trust and Estate Counsel (ACTEC), Fellow
- Boston Probate and Estate Planning Forum, Member, Former Moderator