

**Sarah J. O'Leary**

Senior Counsel  
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Sarah's practice is focused in the areas of estate planning, estate settlement, and trust administration. She employs a holistic approach to developing and implementing practical tax and estate planning strategies for individuals and families. Her guiding principles emphasize flexibility, tax-efficiency, preservation of family wealth, client education, and fostering good relationships around family wealth across multiple generations. Sarah works with her clients to craft estate plans which are designed to minimize estate, gift, and generation-skipping transfer taxes, and which reduce the impact of Probate on their estates. While a basic comprehensive estate plan is appropriate for most families, the family and financial circumstances of many clients warrant the integration of more advanced estate planning techniques. Sarah has assisted clients in designing and implementing Grantor Retained Annuity Trusts (GRATs); Irrevocable Life Insurance Trusts (ILITS); Spousal Lifetime Access Trusts (SLATs); Qualified Personal Residence Trusts (QPRTs); and irrevocable trusts for children, grandchildren, and other family members. Sarah has extensive experience in estate settlement, including probate, estate tax, and trust funding aspects of the process. In addition, Sarah advises fiduciaries with respect to ongoing trust administration and serves as Trustee for several families.

Prior to attending law school, Sarah had a successful fourteen-year career as a management consultant, providing financial and strategic planning services to clients in the health care industry.

**Memberships**

- Trust and Estates Section of the Boston Bar Association
- Massachusetts Bar Association
- American Bar Association
- Boston Estate Planning Council



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**Related Practices**

- Estate Planning
- Estate Settlement
- Estate Administration

**Admissions**

- Commonwealth of Massachusetts
- United States Supreme Court

**Education**

- Bachelor of Arts degree, cum laude, from Syracuse University in 1988
- M.B.A. from Syracuse University in 1994
- Juris Doctor from Boston College Law School in 2004