

Alison E. Lothes

PARTNER

(781) 431-9788

alothes@grcpc.com

Alison is an estate planning attorney who works with individuals, couples and families to craft estate plans that protect their assets and meet their personal objectives. She also assists families (both as beneficiaries and fiduciaries) in navigating the probate and estate administration process and the ongoing administration of trusts.

Alison counsels clients on how to manage and transfer personal assets in a tax-efficient manner, considering estate, gift and generation-skipping transfer taxes. With her assistance, clients can reduce their taxable estates and plan for future generations. She leverages lifetime gifts by using various methods such as funding dynasty trusts, insurance trusts, qualified personal residence trusts, grantor retained annuity trusts and other grantor trusts and family investment vehicles. Alison also assists clients in achieving their charitable goals through funding or establishing charitable trusts during their lifetimes and/or planning charitable bequests at death. Alison's friendly and approachable demeanor helps clients feel at ease when discussing their long-term goals. Clients depend on her proactive, thorough and responsive style.

Always on top of developments in her field, Alison co-authors a monthly column in *Trusts & Estates Magazine*, a national print and online publication. She frequently participates as a panelist in MCLE presentations and was recently quoted in the *Boston Globe*. Alison has been named a Massachusetts Super Lawyer "Rising Star" and "Top Women Lawyer."

Prior to joining Gilmore Rees & Carlson, Alison was associated with the estate planning departments of the Chicago office of Kirkland & Ellis LLP and the Boston office of Sullivan & Worcester LLP.

In her free time, Alison looks forward to spending time with her three young children in addition to skiing, running and playing tennis.

REPRESENTATIVE EXPERIENCE

- Helps individuals, couples and families address important tax-related matters in the estate planning process, with deep experience in reducing tax exposure in connection with planning for the long-term.
- Creates specialized trust structures to meet specific goals both during life and for future generations.
- Assists families in the estate administration process, from the probate of wills to the administration of trusts.
- Counsels individuals and families on ways to achieve long-term charitable goals using charitable trusts.



ALISON E. LOTHES

Partner

Related Practices

- Estate Planning
- Estate Administration

Admissions

- Commonwealth of Massachusetts, 2007

Education

- University of Pennsylvania Law School, Order of the Coif, J.D., 2006
- Dartmouth College, B.A., cum laude, 2001

Professional & Community Involvement

- Boston Bar Association, Member
- Boston Estate Planning Council, Member
- Greater Boston Fiduciary Law American Inn of Court, Member
- Trusts and Estates Consortium, Member

Awards and Recognition

- Massachusetts Super Lawyers "Rising Star"
- Massachusetts Super Lawyers "Top Women Lawyer"
- Boston Magazine Five Star Investment Professional