

# ESTATE PLANNING & PROBATE ADMINISTRATION



Macchi & Macchi has been developing estate plans for its clients since the Firm's inception in 1965, making us one of the oldest and most well-established estate planning practices in the area. In addition, our real estate and business expertise allows us to offer a multi-disciplinary approach which takes into consideration all facets of a client's estate.

Our objectives in estate planning are threefold: first, to conserve assets to the greatest extent possible by reducing the tax burden; second, to maintain flexibility and privacy while alive, providing for disability or incapacity when necessary; and third, to facilitate the orderly disposition of assets upon death, potentially reducing or eliminating the need for probate.

Every client has unique goals, perspectives, and financial needs; therefore, we are creative in our approach and tailor each plan to meet an individual's or family's specific situation. We have experience with both traditional and non-traditional families.

## OUR AREAS OF EXPERTISE INCLUDE:

- Wills
- Revocable and Irrevocable Trusts
- Durable Powers of Attorney
- Health Care Proxies
- Young Adult Powers of Attorney and Health Care Proxies
- Living Wills
- Medicaid Planning
- Tax Planning
- Gifting
- Charitable Giving
- Business Succession Planning
- Probate Administration

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For more information, or to get started on your Estate Planning project, please contact: Philip H. Macchi or Joanna G. Hilvert at 781-762-1700.

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& Probate Administration | Business Law

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