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Thomas P. O'Neill, III Joins Ruberto, Israel & Weiner

By RIW on December 8, 2022

RIW is pleased to announce that **Thomas P. O'Neill, III** has joined the firm as an associate in the **Trusts & Estates Practice Group** and **Corporate & Business Department**.

Thomas P. O'Neill, III concentrates his practice on estate planning and the administration of trusts and estates. Tom represents trustees, fiduciaries, and beneficiaries in all phases of trust and estate settlement, including asset valuations and transfers, Federal and Massachusetts estate tax compliance, fiduciary accounting, and distribution issues. He also represents clients in litigation related to trusts and estates. This includes removal of trustees and personal representatives, will challenges, contested asset valuations and appraisals, negotiation, drafting, and implementation of trust and estate compromise agreements, and estate tax audits.

Tom also educates individuals and families of all wealth levels on the benefits of estate planning. He collaborates with clients and their financial advisors to develop and implement customized estate plans with a focus on tax efficiency and wealth preservation for successive generations. Tom advises high net-worth clients on estate and gift tax mitigation strategies, including lifetime gifts, asset valuation discounts, and irrevocable trust planning. He works with clients to maximize use of available estate and gift tax exemptions, and regularly represents clients in the creation and implementation of lifetime revocable trusts, Irrevocable Life Insurance Trusts (ILITs), Qualified Personal Residence Trusts (QPRTs), Grantor-Retained Annuity Trusts (GRATs), Spousal Lifetime Access Trusts (SLATs), Special Needs Trusts, Family Limited Partnerships (FLPs), and other entities.

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