PARTNER

Christopher G. Mehne

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OVERVIEW

Chris Mehne is a respected trust and estate lawyer with many years of experience helping clients in central Massachusetts, Metro West and Cape Cod with business succession planning and other sophisticated estate and trust planning and administration needs. Chris' clients often turn to him when they're facing difficult, multi-generational family business issues or when they need tax-driven estate plans and updates that are more responsive to their high net worth.

"Many of my estate-planning clients are younger professionals and entrepreneurs," Chris notes, "who recognize the importance of planning as their careers evolve, they accumulate wealth and their families grow." He regularly serves clients as their Personal Representative and Trustee and also handles complex issues involving guardianship and conservatorship law.

Regardless of their age or circumstances, Chris takes a holistic approach to solutions for his clients. His many years of experience across a wide range of issues allow him to bring accounting, real estate, tax and other outside expertise to bear on a problem or opportunity. "Along with the benefits of my experience," he says, "I deal with clients on a personal level that has a way of putting them at ease, particularly in high-stress, high-emotion situations where my clients need to be reassured that I will be their friend and advisor as well as their lawyer."

Besides work

Chris enjoys playing golf, traveling and watching his grandchildren's sports events. "I'm also involved in community work, including serving as the Moderator in my home town and as trustee of our public library foundation and offering volunteer legal services at my local senior center."

EXPERIENCE

Updated estate plan reflects tax minimization, charitable giving and post-retirement income

Chris has recently been working with a married couple he's known for years. "This is common in my practice," Chris notes. "Our children grew up together, then we became friends, and then they became clients. I started out years ago preparing the couple's basic estate planning documents, and we're now on our third plan update." As part of their current update, Chris advised the clients on several charitable giving techniques. He negotiated gift agreements with their alma maters and a local community foundation and also created a charitable remainder trust which will benefit a number of charities when the couple are deceased. "Meanwhile," Chris adds, "the trust generates income for the clients during their retirement years." Chris is also handling a complex series of investment and insurance transactions that minimize tax liability and maximize post-retire income. Chris serves as co-trustee for the couple's estate plan.

A holistic solution to a thorny family disagreement with a Trustee

A client on Cape Cod is a Trustee for a trust created by a longtime friend of his. With Chris acting as advisor, the Trustee faced litigation with the friend's family members involving valuable real estate that had to be sold. "There were complex, competing interests within the family," Chris explained, "reflecting a second marriage and multiple generations." Thanks to Chris' listening skills and technical help, the client and the family members reached a compromise. "The settlement included the sale of the real estate and the establishment of a continuing trust for the benefit of the youngest generation of the family." The family and the Trustee settled the dispute without litigation.

AFFILIATIONS

PROFESSIONAL/COMMUNITY

- *Best Lawyers in America,* selected by his peers for listing in the field of Trusts and Estates, 2013, 2017-2020
- Massachusetts Continuing Legal Education, Inc., recently honored for over 25 years of teaching courses and writing books for lawyers in the estate planning and probate field
- Fellow, American College of Trust and Estate Counsel
- Fellow, National Academy of Elder Law Attorneys
- Member, Massachusetts Bar Association Probate Law Section, Worcester County Bar Association Probate Law Section and Estate and Business Planning Council of Worcester County
- Trustee, Goddard/Homestead, Inc.
- Corporator, Children's Friend, Inc.
- Corporator and Scholarship Committee Member, Greater Worcester Community Foundation, Inc.
- Moderator, Town of Shrewsbury, MA
- Co-founder, Shrewsbury Education Foundation, Inc.
- Co-founder, Shrewsbury Youth and Family Services, Inc.
- Past Recipient, Greater Worcester Jaycees Outstanding Young Leader Award

PREVIOUS

- Former President, Goddard/Homestead, Inc.
- Former Director, Shrewsbury Development Corporation
- Former Member and Chair, Shrewsbury School Committee

ARTICLES & TALKS

ARTICLES

- "Shedding Light On Blind Trusts ," *Private Wealth* Magazine, Summer 2017
- "Guardianship and Conservatorship Practice Under the Massachusetts Uniform Probate Code," MCLE, 2013

TALKS

- Lecturer and Curriculum Advisory Committee Member, Massachusetts Continuing Legal Education, Inc.

BAR ADMISSIONS

- Massachusetts
- New Hampshire

EDUCATION

- J.D., *cum laude*, Boston College Law School
- B.A., *summa cum laude*, Boston College; Phi Beta Kappa