

PARTNER

Dale A. Kaiser

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OVERVIEW

Dale A. Kaiser is a seasoned attorney with nearly 40 years of experience in estate and family business planning and estate and trust administration. She works closely with clients and their families and advisors to design and implement a comprehensive estate plan to meet that family's goals. She is knowledgeable about all aspects of estate and gift planning including generation-skipping, asset protection, special needs and charitable planning. Dale particularly enjoys finding practical and creative solutions to estate planning and administration complications and challenges.

Dale has extensive experience in estate and trust administration. In this role, she advises fiduciaries about probate, estate taxes, trust funding, and distributions. She also works with business owners in forming entities and planning for business succession.

In 2014, Dale was awarded the Accredited Estate Planner® (AEP) designation by the National Association of Estate Planners and Councils (NAEPC) and the Boston Estate Planning Council (BEPC) which recognizes Dale's achievement of graduate level specialization in estate planning in addition to her already recognized professional credentials within the discipline. She received the award in acknowledgement of her experience, knowledge, education, professional reputation, and character in the field of estate planning and estate and trust administration.

Dale has appeared as an estate planning guest expert at numerous seminars and on several local radio shows and has been quoted on estate planning topics in local newspapers and Fidelity Focus magazine. In 2009, she was an adjunct professor at Northeastern University School of Law teaching a course in Trusts and Estates. Dale served as a member of the Board of Trustees of the Boston Estate Planning Council and the YWCA Cambridge. In 2015, Dale flew to Shenzhen China for a weekend seminar to teach Chinese lawyers about the use of trusts in the United States.

Before Bowditch

Dale formed the Kaiser Law Group, a boutique estate planning firm, in 1999 with the goal of providing clients with technical expertise, personal attention and superior legal services in a convenient suburban location. Prior to that, Dale practiced for over a decade in the private client departments of large Boston law firms.

Besides Work

Dale is a long-time resident of Needham, where she raised her children. She particularly enjoys knitting (her form of therapy) and spending time with her family. Over the years, Dale and her family have had many adventures including

exploring National Parks in an RV.

AFFILIATIONS

PROFESSIONAL/COMMUNITY

- Member, Women's Bar Association
- Boston Bar Association
- Massachusetts Bar Association
- New York Bar Association
- Member, Newton-Needham Regional Chamber

PREVIOUS

- Former Member, Board of Directors, Boston Estate Planning Council
- Former Member, Board of Trustees, YWCA Cambridge

ARTICLES & TALKS

TALKS

- "Gifting Strategies to Reduce Massachusetts Estate Tax," *Massachusetts Lawyers Weekly* Webinar, September 22, 2021

BAR + COURT ADMISSIONS

- Massachusetts
- New York

EDUCATION

- J.D., State University of New York at Buffalo
- M. Ed., State University of New York at Buffalo
- B.A., University of Rochester