OF COUNSEL

Gregory J. Englund

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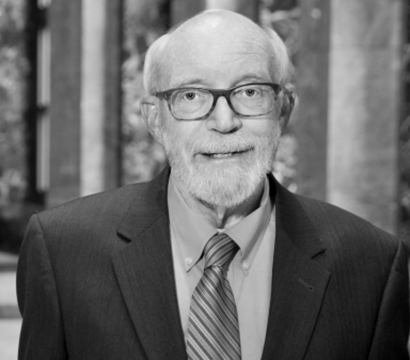

OVERVIEW

Greg Englund is an estates and trusts attorney with more than 40 years of experience working with individuals, families and business owners. Greg helps clients make important decisions while planning for their future needs, creating wills, trusts, powers of attorney, health care proxies with living wills and other legal arrangements. Greg works with clients to help them develop charitable strategies and structures, including family foundations and charitable remainder trusts.

Greg guides clients through the process of selecting wealth transfer tax planning strategies, as well as employing techniques that help build and protect crucial assets. He serves as a counselor to clients and collaborates with accountants, investment advisors, financial planners, insurance agents and other professionals.

Greg has written two books based on his work. *Beyond Death & Taxes* tells the story of the Roberts family and their advisors as they create their estate plan and has more than 100,000 copies in print. Published in 2000, *Seasons of Decision* follows the Roberts family and their advisors through a cycle of important decisions, including a first job, marriage, buying the first home, starting a business, divorce and planning for retirement. Both books offer practical guides for estate planning.

Greg is a Martindale-Hubbell AV®-rated Preeminent attorney, a certification indicating the lawyer's peers rank him at the highest level of professional excellence and ethics.

Besides Work

Greg served in the Peace Corps as a volunteer in Cameroon, West Africa, before becoming a lawyer.

EXPERIENCE

Business Planning

- Counsels family-owned businesses on a range of approaches for maintaining business assets while planning for the family needs related to the business.

Estate Planning

- Crafts estate plans for families to address important tax and nontax issues for the future. Helps families limit exposures while efficiently transferring wealth to future generations.
- Handles postmortem estate and trust administration, including the management of tax returns for the smooth transfer of

assets to beneficiaries.

- Advises professional and family executors and trustees to help them fully understand fiduciary duties and tax laws related to the administration of estates and trusts.
- Acts as a trustee to ensure proper administration in accordance with the trust terms and the creators' wishes. Also acts as a liaison with the beneficiaries of trusts.
- Drafts and implements revocable and irrevocable trust arrangements to take advantage of income and wealth transfer planning opportunities. Also advises on selecting trustees and implementing appropriate trustee succession arrangements.

Charitable Giving

- Advises families on charitable giving and entity structure to reflect family values while minimizing income and wealth transfer taxes, including creation of family foundations and charitable remainder trusts.

AFFILIATIONS

- American Bar Association
- Boston Bar Association

BAR ADMISSIONS

- Massachusetts

EDUCATION

- B.A., Swarthmore College
- J.D., Harvard Law School
- LLM, Boston University School of Law