

PARTNER

Michael D. Brockelman

T. 508-926-3407 E. mbrockelman@bowditch.com



OVERVIEW

Mike Brockelman is an experienced lawyer concentrating his practice on estate and business planning and estate and trust administration, primarily for clients in central Massachusetts. “Most of my clients are my age,” Mike notes. “I’m happy to say they also often become friends.”

Mike designs successful business succession plans both within families and with arm’s length transactions. “I also advise estates involving multi-generation family businesses, second marriages and significant assets.”

Since 1993, Mike has been selected by his peers to be included among the *Best Lawyers in America* in the field of Trusts and Estates. He has also been elected a Fellow of the prestigious American College of Trust and Estate Counsel.

Mike has authored numerous texts for continuing legal education programs, particularly on the subject of estate taxation, for Massachusetts Continuing Legal Education, Inc.

Besides work

Mike’s an avid reader of U.S. history. “I’m also a golfer and an ex-high-school ballplayer...who takes out frustrations as a centerfielder on a senior men’s softball team.” In addition, he’s on the board of Old Sturbridge Village, where he currently chairs the development committee for the popular, living history attraction. “I also volunteer at the village, re-enacting a lawyer from the 1830s!”

EXPERIENCE

A charitable foundation for the widow of a client

A woman’s deceased husband was a wealthy, long-time business client of the firm. Mike suggested to the widow that she was wealthy enough that she could do something significant for her community, and, in time, she acted on his advice. Mike helped her set up a private foundation, to which she gave several million dollars. “The foundation served as the catalyst for a new YMCA in the family’s town.”

A trust for a disabled daughter

Mike’s client wanted an estate plan containing a trust rather than having his substantial assets go directly to his daughter. “She had had a stroke,” Mike explained, “and with few family members living nearby, our client wanted to make sure the

trust took care of her.” In addition to setting up the man’s trust, Mike helped make the woman’s house more accessible and signed her up with a meal-delivery service. “Sometimes, she just wanted human interaction.”

AFFILIATIONS

PROFESSIONAL/COMMUNITY

- Member, Visiting Advisory Committee, Diabetes Center for Excellence at UMass Medical School
- Fellow, American College of Trust and Estate Counsel
- Member, Estate and Business Planning Council of Worcester County
- Member, Board of Trustees of Old Sturbridge Village

PREVIOUS

- Former President, Greater Worcester Community Foundation
- Former President, Estate and Business Planning Council of Worcester County
- Former Chairman, Board of Trustees of Old Sturbridge Village

BAR ADMISSIONS

- Massachusetts

EDUCATION

- LL.M., Taxation, Boston University
- CFP, College for Financial Planning
- J.D., Boston College Law School
- B.A., Cornell University