PARTNER

Katherine R. Dorval

T. 508-926-3420 E. kdorval@bowditch.com

OVERVIEW

Katie Dorval is an established estate planning attorney who helps individuals, couples and families, both in Massachusetts and Rhode Island, with estate, trust, business succession planning and other complex estate and administration needs.

Katie believes in a common-sense, practical approach to help clients achieve their long-term goals. She listens to her clients' needs and advises them regarding estate, gift and generation-skipping transfer taxes. With her counsel, clients can reduce their estate tax exposure while securely planning both for the immediate future and generations to come.

Katie's expertise includes traditional estate planning documents such as wills and trusts, but she also routinely advises clients regarding asset protection, real estate holding entities, limited liability companies, charitable remainder trusts, irrevocable gifting trusts, and other sophisticated gifting techniques.

Katie's trusted approach, along with her subject expertise and client communication skills, allow her to:

- Help individuals, couples and families craft estate plans that minimize exposure to state and federal estate taxes, and which also reflect the client's ultimate goals for the disposition of assets;
- Counsel young families regarding the importance of wills and trusts as a safety net to protect young children; and
- Advise clients regarding techniques available to protect their investment in real estate, including family vacation homes and commercial real estate.

Katie is also a co-editor of the Don't Tax Yourself blog.

Besides work

Katie enjoys spending time with her sons and watching their sporting events. When she has extra time, she enjoys reading and relaxing at the beach.

EXPERIENCE

- In a year where a high-net worth client had sizable income, the client sought Katie's assistance with creating a charitable remainder trust to create an income tax deduction and to reduce the size of the client's taxable estate for estate tax purposes.

- Advised spouses in a blended family on ways to pass wealth to the next generation while also providing lifetime benefits to the surviving spouse and maximizing estate tax savings.
- Advised clients on ways to leverage their lifetime gift tax exemption by making gifts of interest through limited liability companies.
- Advised clients on estate tax exposure and helped created irrevocable life insurance trusts to both cover the tax liability and be excluded from the gross taxable estate.

AFFILIATIONS

- Member, Boston Probate and Estate Planning Forum
- Member, Estate and Business Planning Council of Worcester County
- Member, Real Estate Bar Association
- Member, Women's Bar Association
- Member, Rhode Island Bar Association

ARTICLES & TALKS

ARTICLES

- "Amending The IRS's Anti-Clawback Provision On Gifting," *Financial Advisor*, 2022

TALKS

- How to Be a Financial Badass in Your 50s and Beyond, Worcester Regional Chamber of Commerce, 2023

BAR ADMISSIONS

- Massachusetts
- Rhode Island
- Federal District Court for the District of Massachusetts

EDUCATION

- J.D., Suffolk University Law School
- B.A., *summa cum laude*, Syracuse University

