

PARTNER

Katherine R. Dorval

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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, family limited partnerships and shareholder buy-out agreements.

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;
- Advise clients regarding techniques available to protect their investment in real estate, including family vacation homes and commercial real estate; and
- Advise small business owners regarding business succession planning.

Katie is also a co-editor of the [Don't Tax Yourself](#) blog.

Before Bowditch

Katie was senior counsel at a Boston-area firm.

Besides work

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

AFFILIATIONS

- 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*, May 27, 2022

BAR ADMISSIONS

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

EDUCATION

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