

TRUST OFFICER

Maria Menard Pitney

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OVERVIEW

Maria Menard Pitney brings her extensive legal experience to the trust department as a trust officer overseeing the receipt, safekeeping, investment and management of assets for more than 100 trust and estate accounts. After practicing law for over 25 years, including ten years at Bowditch in the Estate, Financial and Tax Planning Group, Maria returned to Bowditch and joined the trust department. As an attorney familiar with trust instruments and legal and financial documents, Maria applies her background and experience to assist clients with the application and interpretation of wills and trusts, execution of trades, and the collection and distribution of funds.

Maria utilizes her strong interpersonal skills and knowledge to assist clients and attorneys with all aspects of estate and trust administration. She works closely with clients, family members, trustees, beneficiaries, accountants, brokers and other professionals to marshal assets, oversee the probate process, fund and administer estates and trusts, prepare annual accountings and ensure the timely preparation and filing of estate and fiduciary income tax returns.

Client service and meeting the needs of the client are foremost in all that Maria does. Because she is involved in the estate or trust administration process from the very beginning, she acts as a “point person” for clients and beneficiaries. She believes that one of her most important roles is to be accessible to clients, the person they can turn to with questions and concerns relative to estate and trust administration. Her depth of experience and ability to explain and navigate the administration process make her an invaluable resource to clients.

After graduating from law school in 1989, Maria spent over ten years at Bowditch as an associate in the Estate, Financial and Tax Planning Group. During that time, she earned an LL.M. in taxation from Boston University. She later practiced law at another Worcester-area firm, specializing in estate planning, estate and trust administration and elder law.

Besides work

When she is not in the office, Maria enjoys reading, and is an avid Red Sox, Patriots and Celtics fan.

AFFILIATIONS

- Member, Estate and Business Planning Council of Worcester County

EDUCATION

- LL.M., Taxation, Boston University
- J.D., *cum laude*, New England School of Law
- B.A., *cum laude*, Regis College