Heidi A. Seely

Partner

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Overview

Heidi Seely assists families and individuals in all aspects of the broader trusts & estates practice, with a focus on the personal and family relationships at the core of each plan. Heidi has extensive experience in planning for and implementing sophisticated yet understandable strategies to transfer wealth between generations while minimizing tax obligations. She also skillfully supports individuals and fiduciaries in navigating complex estate settlements, including all related asset marshaling, tax return preparation, and management of distributions. In addition, she provides a personal touch in advising on trust matters and regularly serves as a professional trustee of private trusts.

Heidi frequently speaks on all matters relating to her practice and is co-author of The Boston Trustee: The Lives, Laws and Legacy of a Vital Institution. She has been an active member of the Boston Bar Association for more than 10 years and was honored to serve as co-chair of its Trusts & Estates Section. Heidi is a Fellow of the American College of Trust and Estate Counsel (ACTEC).

Education and Credentials

Education

Santa Clara University, B.A., 2003

Suffolk University Law School, J.D., *cum laude*, 2010

Admissions

Commonwealth of Massachusetts

State of California

Affiliations

American College of Trust and Estate Counsel (ACTEC)

Boston Foundation Professional Advisors Network

Boston Bar Association, Trusts and Estates Section, Co-Chair, 2021-2023

Boston Estate Planning Committee

Practices & Industries

Private Client

Trust & Estates

Trust Services and Fiduciary Compliance

Greater Boston Fiduciary American Inn of Court

Recognition and Community

No aspect of this advertisement has been approved by the highest court of any state. Prior results do not guarantee a similar outcome. See Awards Methodology.

Recognitions

Selected to the list of Massachusetts *Super Lawyers* Rising Stars (Thomson Reuters), Estate Planning & Probate, 2015-2020

News

Heidi Seely Named to ACTEC Fellowship 2025 Class
October 24, 2024

Day Pitney Elects Four New Partners
January 2, 2024

Heidi Seely Nominated to the Boston Foundation's Professional Advisors Network
June 13, 2023

In The Media

"Heckerling Recap Webinar: Panel Discussion", Boston Estate Planning Council
February 29, 2024

Day Pitney Elects Four New Partners
Attorney At Law Magazine, January 2, 2024

"Estate Planning: MCLE: BasicsPlus!," Massachusetts Continuing Legal Education New England Chapter
May 22, 2023

"Must-Know Strategies in Estate Planning 2023," Jay Darby's Tax Briefings
May 16, 2023

"2023 Heckerling Recap: Panel Discussion," Boston Estate Planning Council
February 27, 2023

"Protecting Your Wealth," Fidelity Wealth Management Webinar
March 2, 2022

Boston Bar Association Trusts & Estates Section Mid-Year Review Webinar
January 19, 2021

"Estate Planning: MCLE BasicsPLUS, Initial Steps, Fundamentals and Estate Planning Documents," MCLE
November 17, 2021

"Boston Practice Group: Estate Planning – Practical Suggestions for Advisors & Their Clients," Financial Planning Association
November 1, 2021

Trusts and Estates End of Year Review 2020
June 8, 2020

Proposed Legislation Regarding Remote Notarization During COVID-19
Wealth Management, April 17, 2020

COVID-19 Pandemic Has Elder Law Bar on Speed-Dial
Massachusetts Lawyers Weekly, April 15, 2020

The Boston Trustee: The Laws, Lives, and Legacy of a Vital Institution
The Boston Trustee, December 5, 2015

Trust for Minors
Massachusetts Continuing Legal Education, January 1, 2013