April 11, 2025

Day Pitney Boston Partner Amy Lonergan Elected as an ACTEC Fellow

Day Pitney LLP is proud to announce that Boston Partner Amy R. Lonergan has been elected as a Fellow of The American College of Trust and Estate Counsel (ACTEC), one of the most prestigious honors in the trusts and estates field. The firm now has 14 attorneys with this distinction, which recognizes exceptional service, scholarship, and commitment to the profession. Lonergan's election was confirmed at the ACTEC Board of Regents Annual Meeting on April 2 in La Quinta, California.

ACTEC is a national professional organization of approximately 2,400 lawyers who have been elected to membership by demonstrating the highest level of integrity, commitment to the profession, competence, and experience as trust and estate counselors. Membership requires at least 10 years of active practice, with Fellows chosen for their reputation, skill, and leadership in areas such as lecturing, writing, teaching, and legislative work. ACTEC is dedicated to improving probate, trust, and tax laws and advancing professional standards. For more information on the organization and its methodology, click here.

Lonergan serves as the Business Unit Leader for the firm's Private Client department, where she advises individuals and families on all aspects of estate and transfer tax planning. Her practice centers on crafting sophisticated, tailored strategies to help clients transfer wealth to future generations in a way that reflects their legacy and intentions while minimizing tax exposure. She works closely with business owners, entrepreneurs, real estate developers, and private equity and hedge fund principals. In addition to her planning work, Lonergan regularly serves as a professional trustee and counsels individuals and financial institutions on matters involving probate, trust administration, estate settlement, and fiduciary litigation.

She has extensive experience in all aspects of complex estate planning, including tax-efficient gifting, asset protection, and the use of entities such as partnerships and LLCs. Her work often incorporates advanced tools like GRATs, QPRTs, installment sales to grantor trusts, life insurance trusts, and charitable remainder trusts. She advises tax-exempt organizations—particularly private foundations and public charities—on formation, governance, and regulatory compliance.

Actively engaged in both the legal and broader community, Lonergan has held leadership roles with the Boston Estate Planning Council and the Trusts & Estates Section of the Boston Bar Association. She is also a member of the firm's Executive Board. Lonergan earned her J.D., cum laude, from Suffolk University Law School. She is admitted to practice in Massachusetts and New Hampshire.

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

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