CHOATE
wealth

www.choatewealth.com



# Jessica L. Lambert

ATTORNEY | PARTNER

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## Overview

Jessica Lambert, co-chair of Choate Wealth, provides comprehensive and personalized estate planning advice to high net worth individuals and families, with an emphasis on sophisticated wealth transfer strategies to minimize estate, gift, and generation skipping transfer taxes. She works closely with multiple generations of families on all aspects of wealth management, ranging from basic estate planning such as wills, durable powers of attorney, and health care proxies to sophisticated strategies for lifetime asset transfers, including grantor retained annuity trusts (GRATs), family limited partnerships, income tax advantaged grantor trusts, and qualified personal residence trusts (QPRTs).

Jessica advises clients on making tax-efficient gifts to charity, including retirement assets and qualified appreciated stock, and assists with the establishment of private family foundations. She represents private foundations in applying for and maintaining exempt status, and also helps with tax and estate planning for multiple generations of international families and trustees of offshore trusts.

### Related Services

**Estate Planning**

**Philanthropic Planning**

**Professional Trustee and Administration Services**

### Education

- Boston College Law School, JD (2008) *magna cum laude*
  Articles Editor, *Boston College Law Review*
- University of Rochester, BA (2002) *cum laude*

### Admissions

- Massachusetts

### Representative Engagements

- Implemented estate planning strategy by which client has transferred more than $30 million to children free of gift tax through grantor retained annuity trusts.
- Advises trustees, family office, and multiple generations of internationally based family members in all matters relating to estate planning and administration of trusts totaling in excess of $5 billion.
- Created and successfully obtained tax exempt status for private operating foundation and advised on subsequent purchase of large, ecologically-significant parcel of land to be held for conservation purposes.
- Drafted U.S. estate plan for non-U.S. citizen spouses to qualify transfer of U.S. real estate for unlimited

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federal and state estate tax marital deductions.

- Successfully reformed 145-year old charitable trust to enable funds to be used for more modern purposes.

## Professional & Community Involvement

- Former Chair, Choate Women's Network (CWN)
- Organizer, Choate Wealth Next Level Wealth Program
- Former Member, The Boston Foundation Professional Advisors Network (PAN)

## Recognition

- *Chambers High Net Worth* (2026)



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