Susan A. Robb

Counsel

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Overview

Susan Robb advises high net worth individuals and families on all aspects of estate planning, estate administration, and trust administration. She works with clients to structure plans that achieve their estate, income tax, business succession, philanthropic, and multi-generational wealth transfer goals. Susan enjoys developing relationships with clients and helping them implement their plans so as to minimize disruptions to family dynamics. She also counsels individual, professional, and corporate trustees and personal representatives on fiduciary duties and best practices in the administration of trusts and estates.

Education and Credentials

Education

Suffolk University Law School, J.D.

Hamilton College, B.A., Concentration in Mathematics

Admissions

Commonwealth of Massachusetts

Affiliations

National Association of Estate Planners & Councils, Accredited Estate Planner® (AEP®)

Boston Estate Planning Council, Legislative Committee, Member, 2024-Present, Chair, 2023-2024; Leadership Development Committee, Co-Chair, 2022-2023, Vice Chair, 2021-2022; Board of Directors, 2018-2021; Officer Nominations Committee, 2018-2020; Board Nominations Committee, 2021-2022, 2018-2020; Budget & Finance Committee, 2019-2020; Sponsorship Committee Co-Chair, 2017-2018

Boston Bar Association, Trusts & Estates Section, Public Policy Committee, Co-Chair, 2023-Present; CLE Committee, Co-Chair, 2020-2023, 2008-2009; Trust Administration Committee, Co-Chair, 2017-2019; Communications Committee, Co-Chair, 2015-2017

The Boston Foundation, Professional Advisors Network, 2018-2021

Practices & Industries

Private Client

Trust & Estates

Trust Services and Fiduciary Compliance

Insights

Corporate Transparency Act Reinstated (again)
February 20, 2025

In The Media

Public Policy Issues Impacting Trusts & Estates, Real Estate Bar Association for Massachusetts
October 3, 2025

Trust & Estates End of Year Review 2025
Boston Bar Association, June 24, 2025

Trust & Estates Mid-Year Review 2025
Boston Bar Association Virtual Webinar, January 30, 2025

Trust & Estates Mid-Year Review 2024
Boston Bar Association Virtual Webinar, January 17, 2024

Introduction to Irrevocable Trusts
Boston Bar Administration's Trusts & Estates Fundamentals Committee Webinar, January 19, 2022

Coming in as a Successor Trustee – Releases and Best Practices
November 2, 2018

Fixing Trusts: How Estate Planners, Fiduciaries & Litigators "Fix" Trusts
October 23, 2018

Changing Trust Situs
March 26, 2018

Touchy Topics of Engaging Counsel, the Privilege of Privilege, and Who Pays the Bill
February 7, 2018

Trust Assets in Divorce – Trustees and Trust Advisors Beware
October 10, 2017

Estate, Gift and GST Tax Basics for the New Estate Planner, Boston Bar Association
November 4, 2015 and November 28, 2016

Basis Consistency Requirements
Boston Bar Association, October 9, 2015

Trusts and Estates Mid-Year Review
January 23, 2015