



# 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

### 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

## Insights

Corporate Transparency Act Reinstated (again)  
February 20, 2025

## Practices & Industries

[Private Client](#)

[Trust & Estates](#)

[Trust Services and Fiduciary Compliance](#)

# In The Media

## 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