

David E. Peterson, Of Counsel



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David Peterson's practice focuses on all aspects of Trusts and Estates, including estate planning, probate, and trust administration. He joined the firm in 2024 after fifteen years with boutique Trusts and Estates firms in Massachusetts and Vermont.

David helps individuals and families structure the transition of their wealth to the next generation. His clients include professionals, business owners, retirees, beneficiaries, and their families. David regularly prepares estate planning documents, including revocable and irrevocable trusts, wills, powers of attorney and advanced directives.

For clients approaching or beyond the federal and Vermont estate tax thresholds, David provides counsel on a variety of sophisticated tax and assets protection strategies, including credit shelter and marital deduction planning (QTIP trusts), gifting strategies (annual exclusion, ILITs, IDGTs, SLATs), interest rate arbitrage vehicles (GRATs, QPRTs), valuation discounts, business succession planning, and philanthropic planning.

David guides families through the legal and tax process following the death of a loved one. In representing executors and trustees with the administration of wills and trusts, David prepares probate petitions, fiduciary accountings, and estate tax returns. David also advises clients as to the exercise of their discretionary authority regarding trust funding, asset allocation, and distributions to beneficiaries.

In representing clients, David routinely leads discussions on profound matters of life and death with a backdrop of complex family and financial dynamics. He does so with a careful balance of sensitivity and candor, and he excels at explaining complicated concepts in clear, understandable terms.

EDUCATION

Boston College Law School, J.D. 2008

University of Massachusetts – Amherst, B.S. 2004, cum laude, Environmental Design

MEMBERSHIPS & AFFILIATIONS

Member, Vermont Bar Association

Member, USA500 Clubs

BAR ADMISSIONS

Vermont (2022)

Massachusetts (2008)

PRACTICE AREAS:

- Estate Planning
- Probate & Trust Law

HONORS

Listed as a Top Lawyer for Trusts and Estates in Boston Magazine, 2021 and 2022