



## Jason J. Port, Special Counsel

[jport@gravelshea.com](mailto:jport@gravelshea.com)

Jason J. Port joined Gravel & Shea as Special Counsel in 2022 to head the Tax, Trust, Estates, and Probate practices. Prior to this position, Jason held roles providing fiduciary, trust, estate, tax, legal, and risk oversight, planning and management. Such roles included serving both in-house for large trust company divisions at an investment management firm and national bank, as well as an international law firm.

Following law school and working in large law firms as a paralegal, Jason began in private practice at a well-respected law firm in Massachusetts focusing on complex estate, trust, tax, and wealth planning and administration. Jason further assisted clients with tax issues, probate & fiduciary litigation, real estate issues within trust and estate relationships, asset titling and ownership, and the formation, governance, ownership, and operation of pass-through, for-profit, and non-profit entities.

### EDUCATION

Suffolk University Law School, J.D., 2008  
Saint Joseph's University, B.S., 1999

### ADDITIONAL EDUCATION

Yale School of Management – Executive Education, CPWA®, 2021

### HONORS

"Rising Star" by *Boston* magazine and *Law & Politics*, (2013-2016)  
Worcester "40 Under 40", (2015)  
Leadership Worcester, (2017)

### PUBLICATIONS

*Drafting Wills and Trusts in Massachusetts, Publishing Clause and Ultimate Disposition*, MCLE, (November 2020)  
*Preserving and Transforming Your Client's Principal Residence; Transferring the Home to a Revocable Trust*, MCLE, (July 2014)

### PRESENTATIONS

*Protecting Assets While Qualifying in Medicaid*, National Business Institute, (November, 2016)  
*Revocable Living Trusts from Start to Finish*, National Business Institute, (October 2016)  
*Cutting Edge Issues in Central Massachusetts Estate Planning*, MCLE – Presentation, (February 2015 – 2016)  
*The Probate Process from Start to Finish*, National Business Institute, (October 2015)

[www.gravelshea.com](http://www.gravelshea.com)

*Elder Law Month Presenter*, Massachusetts Bar Association, (May 2013 – 2015)

*Preserving and Transforming Your Client's Principal Residence*, MCLE, (July 2014)

#### BAR ADMISSIONS

Massachusetts (2008)

U.S. District Court, District of Massachusetts (2009)

Vermont (2022)

#### **PRACTICE AREAS:**

- Business Succession Planning
- Estate Planning
- Probate & Trust Law
- Tax Controversy