William T. Whittenberg, Jr

Of Counsel

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Practice Areas

Estate Planning and Probate

Business Formation and Succession Planning

Private Companies and Professional Practices

Not-for-Profit, Charitable and Religious Institutions

Practice Focus

William (Hank) has concentrated his practice on wealth transfer and wealth preservation for the past 18 years. This includes general estate planning, sophisticated estate and gift tax planning, charitable estate planning and asset protection planning, including planning for long term care and elder law. Unlike many estate planning attorneys, Hank recognizes that “wealth” often means more than financial wealth and many of his clients create plans that reflect their family’s values, traditions and culture. Before joining the firm in 2011 he was one of the founding partners of Whittenberg Knudsen, LLP.

Hank frequently writes and lectures on a variety of estate planning topics to the public and on technical estate tax issues to attorneys, CPAs and financial advisors. He has taught the 8 week Estate Planning class of the Financial Planning – CFP course of study at Merrimack College. He is a contributing author to two books regarding estate planning written in laymen’s language. *Generations, Planning your Legacy, Quantum Press, 2000 and Giving, Philanthropy for Everyone*, Quantum Press 2002.

Memberships and Admissions

Hank is admitted to practice in Massachusetts and New Hampshire. He is a member of the Massachusetts Bar Association and the New Hampshire Bar Association, Estate and Elder Law sections. Hank is a member of the National Academy of Elder Law Attorneys and a founding member of WealthCounsel and The Advisors Forum. He is a fellow of the Esperti Peterson Institute and served as an elected member of the Advisory Board and a charter member of the National Network of Estate Planning Attorneys.

Community Involvement

Hank serves as a mentor for Royal Rangers, a church based mentoring program for boys. He is active in his local church and has served on the board of and as Chairperson to a local Christian school.

Honors

Hank has been named a Five Star Wealth Manager by *Boston Magazine* for the past three years. While at Colby College he received the Stephen Coburn Pepper Prize in Philosophy.

Education

B.A., Philosophy, Colby College

LL.M., Taxation, Boston University School of Law

J.D., *cum laude*, Suffolk University Law School