Shipman & Goodwin LLP

David Valente

Counsel

617.218.2038

dvalente@goodwin.com

Boston, MA

View Full Bio

David Valente is counsel in Shipman's Boston office. He focuses his practice on estate planning, business succession planning, tax law, and trust and estate administration. He works with individuals, families, and business owners to structure wealth transfer strategies that balance tax efficiency with personal goals, while also guiding fiduciaries through the complexities of administration.

David designs and implements sophisticated estate plans that include wills, revocable and irrevocable trusts, and advanced vehicles such as Qualified Personal Residence Trusts, Grantor Retained Annuity Trusts, Spousal Lifetime Access Trusts, and special needs trusts. He regularly advises business owners on succession planning, integrating estate and tax strategies with corporate governance to ensure that businesses can transition smoothly across generations. His work often requires coordinating prenuptial agreements, shareholder rights, and trust instruments to protect family and business interests alike.

In addition to planning, David assists fiduciaries, trustees, and personal representatives in estate and trust administration. He advises on probate filings, fiduciary responsibilities, tax compliance, and post-death distributions. Clients rely on his ability to navigate sensitive family dynamics while ensuring legal obligations are met efficiently.

David also counsels clients on asset protection, long-term care planning, retirement plan structuring, and charitable giving. His planning often includes drafting private foundations, establishing LLCs to insulate family assets, and preparing IRS Form 1023 applications for tax-exempt status. His experience with federal gift, estate, and income tax returns ensures that plans are carefully drafted and properly implemented and defended.

Clients value David for his clarity, responsiveness, and practical approach. By combining technical tax knowledge with a focus on client relationships, he delivers solutions that allow families and businesses to preserve wealth, transfer assets efficiently, and achieve long-term stability.

Distinctions

- Listed in The Best Lawyers in America®: *Trusts and Estates* (2023-2026)
- Selected as a Super Lawyer New England Rising Star® in Estate Planning and Probate (2016-2017, 2019)

Professional Affiliations

- Boston Estate Planning Council (2008-present)
- Massachusetts Bar Association, Probate Law Section, Past Member
- Trusts and Estate Consortium, Past Member
- Justinian Law Society (Past Member
- American Bar Association, Section of Real Property Trust and Estate Law - Co-Chair of IRA Accounts & Plan Distribution Committee (2020-2022)
- American Bar Association, Section of Real Property Trust and Estate Law - Vice Chair of IRA Accounts & Plan Distribution Committee (2017-2019)
- Prior to becoming an attorney, David was a financial advisor and achieved the following credentials:
  - Certified Financial Planner (CFP®)
  - Series 7 General Securities
  - Series 66 Investment Adviser
  - Life, accident, and health insurance broker

Community Involvement

- Animal shelter weekly volunteer (2004-current)
- Co-leader, Daisies / Girl Scout local troop
- United Way Big Brother (1997-2001)
- Boston Living Center weekly volunteer (1997-1998)
- 2nd Degree Black Belt, Kempo Karate
- Purple Belt, Brazilian Jiu Jitsu
- Former USKBA-licensed full contact kickboxer
- Former American Powerlifting Association powerlifter (elite)

Credentials

Education

- Boston University School of Law, LL.M. (in Taxation)
- Suffolk University School of Law, J.D.
- Suffolk University Sawyer Business School, M.S., Taxation
- Boston College, B.S.

Bar Admissions

- Massachusetts
- New Hampshire