

# WOODMAN & EATON, P.C.

ATTORNEYS-AT-LAW

801 Main Street, Concord, Massachusetts 01742 Phone 978-369-0960 Fax 978-371-1343 Email bwoodman@woodmaneaton.com

## ATTORNEY PROFILE

*Byron E. Woodman, Jr.*



## EDUCATIONAL BACKGROUND

Boston University, Bachelor of Science in Business Administration, 1966

Suffolk University, J.D., 1969

Boston University, LLM in Taxation, 1976

## PROFESSIONAL EXPERIENCE

Mr. Woodman has practiced in the areas of Estate Planning, Financial Planning, Wealth Management, Wealth Strategies Design, Trust Funding, Estate Administration, Trust Administration, Executor Services and Trustee Services for more than 45 years.

1980 - Present	Founder and President of Woodman & Eaton, PC
2001 - Present	Co-Founder of Monument Group Wealth Advisors, L.L.C., a Registered Investment Advisor
2014 - Present	Co-Founder of Monument Group Tax Advisors, L.L.C.
1994 – 2016	Director of the Cambridge Trust Company
2007 - 2012	New England Conservatory Board of Visitors
2001 - 2009	Co-Founder and President of The Monument Group Fiduciaries, LLC
1985 – 2004	Co-Founder and President of Concord Equity Corporation, a Registered Investment Advisor
1973 - 1980	Sherburne, Powers & Needham (now Holland & Knight), as an Associate and then Partner

## PROFESSIONAL ASSOCIATIONS

Present	Member of the Boston, Massachusetts and American Bar Associations
Present	Accredited Estate Planner with the National Association of Estate Planners and Councils
Present	Boston Estate Planning Council
1972 – Present	Notary Public
1972 – 2006	Real Estate Broker

## **CIVIC AND OTHER ACTIVITIES**

- 1990 - Present Emerson Hospital, Concord, MA, at various times served as a Corporator, eight years as Director, and Director of the Emerson Health Care Foundation, Inc.
- 2014-2016 Deaconess Abundant Life Communities, Member, Board of Overseers for Newbury Court
- 2009 – Present Concord Business Partnership, member of Board and Treasurer
- 1990 - 2001 Concord-Carlisle Scholarship Fund, Concord, MA, eight years as Chairman
- 1983 - 1989 The Fenn School of Concord, MA, Trustee, three years as Treasurer
- 1975-1981 Rotary Club of Concord, Member
- 1973 - 1988 Community Agency Corporation, Concord, MA, President

## **SELECTED PUBLICATIONS**

Co-Author. *Personal Financial Planning, an Audio Cassette Program.* Concord Educational Corporation (1983)

Co-Author. *Personal Financial Planning.* Brickhouse Publishing Co. (1987)

Co-Author. *Generations.* Esperti Peterson Institute, Inc. (1999)

Co-Author. *Master Plan; Integrating Your Financial Planning, Legal and Estate Planning and Life Planning.* (2006)

## **RECOGNITION**

Martindale-Hubbell® AV Preeminent™ Rating

1961 Boy Scouts of America - achieved rank of Eagle Scout

## **MILITARY SERVICE (1966 – 1972)**

1970 Active Duty - primary duties as a JAG officer, lecturer on military law and trial counsel, based in Stuttgart, Germany

Achieved rank of Captain

1966 Commissioned as U.S.A. Artillery Officer; deferred from active duty to attend law school