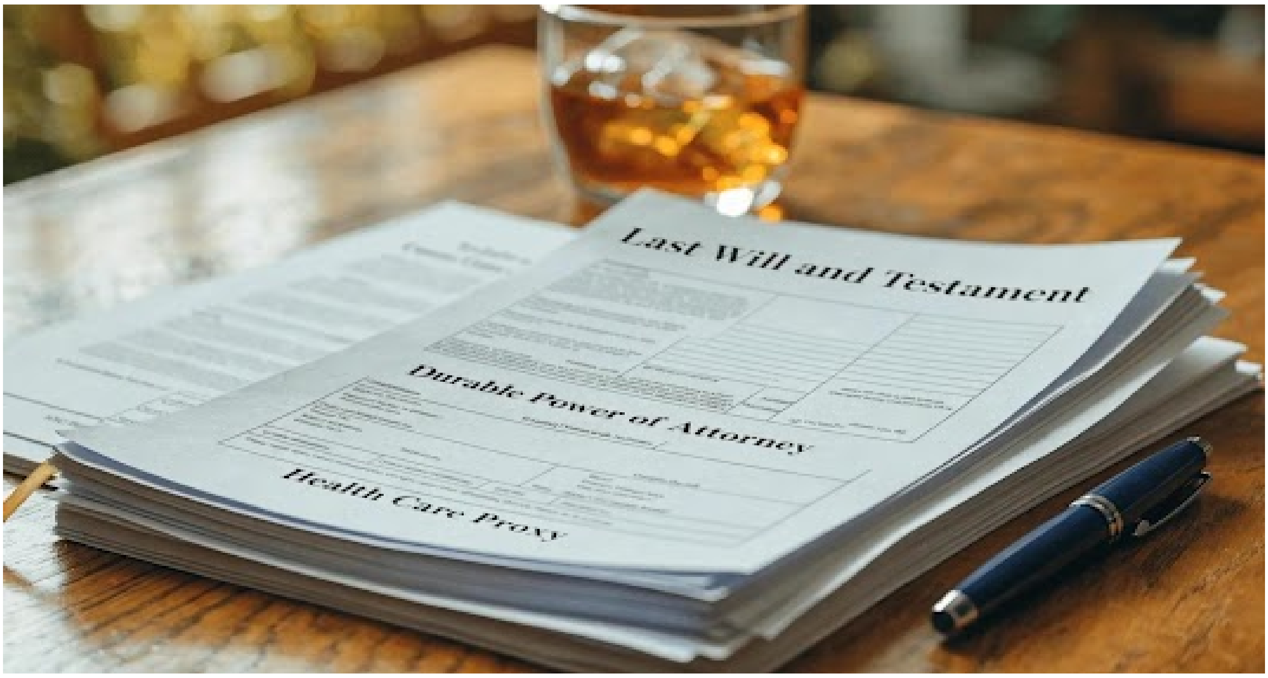

North Shore Elder Law Announces Massachusetts Estate Tax Guidance for Families and Estate Planning Lawyer Selection

August 13, 2026

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North Shore Elder Law & Estate Planning has published guidance explaining the widening gap between the Massachusetts estate tax threshold and the federal estate and gift tax exemption. The firm, based in Melrose, Massachusetts, released the material to address a growing area of confusion for residents who follow national coverage of recent federal changes.

Massachusetts maintains a $2 million estate tax exemption per individual. The federal estate and gift tax exemption stands at $15 million per person in 2026 following the One Big Beautiful Bill Act. That difference has widened the distance between what applies at the state level and what applies at the federal level, and the firm's guidance is designed to help families understand that distinction.

The guidance also notes that Massachusetts does not permit portability between spouses. Under federal rules, portability can allow a surviving spouse to draw on an unused exemption amount. Massachusetts does not offer the equivalent mechanism, so the state exemption applies per person rather than automatically combining across a married couple.

According to the firm, the news value centers on a specific and correctable misconception. Families who read national reporting about the higher federal exemption may reasonably conclude that they have no estate tax exposure, while remaining fully exposed at the state level. The published material seeks to separate the federal picture from the Massachusetts picture so that residents can recognize when state rules may be relevant to their own planning.

"Massachusetts does not recognize portability between spouses, which means the exemption applies per person rather than per couple," said Michael A. Stankavish, Counsel at North Shore Elder Law and Estate Planning. "That distinction is often where families are caught off guard, because they expect the state system to mirror the federal one."

The firm has framed the release as consumer education reported as news rather than as promotion. The guidance does not assess any individual situation, and it does not describe how the tax is computed or the amount of any potential liability. Residents seeking to understand how these rules relate to their circumstances are directed to speak with a licensed attorney.

The firm has also referenced its broader material on selecting counsel, including a guide to finding an estate planning lawyer, for readers who want to understand the qualifications and experience that inform this area of practice. Additional information appears on the firm's practice area page.

North Shore Elder Law & Estate Planning is a legal firm in Melrose, Massachusetts that concentrates on elder law and estate planning. The firm's practice areas include elder law, estate planning, estate administration, guardianships and conservatorships, MassHealth and Medicaid planning, and probate litigation. The firm works with individuals and families navigating life transitions related to aging, incapacity, and end-of-life planning, and it prepares estate plans of varying complexity based on each client's goals.

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North Shore Elder Law & Estate Planning

North Shore Elder Law & Estate Planning helps Massachusetts families with estate planning, elder law, MassHealth planning, probate, guardianships, and asset protection, offering clear guidance and personalized legal support.

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