

WILLS & ESTATES



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Our lawyers can help ensure that the assets you have carefully built are preserved, protected and passed on in the way you intend.

Planning wills and estates includes consideration of a wide range of personal, family and legal issues.

Our lawyers can help you set up wills, estates, trusts and other tools that help you preserve wealth and shift it to your beneficiaries in the way you want. At the same time, we'll advise you of the laws and systems that could have an impact.

Your entire estate is carefully considered, including family businesses, large real estate holdings, income properties, trusts, charitable entities, pension funds and insurance strategies to provide a comprehensive view of all your options.

PRACTICE AREAS

We offer guidance in the following areas:

- Wills & Trusts
- Probate & Estate Administration
- Estate Planning & Wealth Preservation
- [Estate Litigation](#)

SERVICES

- Advising on and preparing wills and enduring power of attorney instruments
- Developing comprehensive strategies to minimize taxes and probate fees
- Inter-generational family wealth planning
- Assisting with estate freezes and the implementation of trusts
- Advising clients about marriage agreements as part of their estate planning
- Assisting clients in second-marriage situations to set up alter ego/joint partner trusts to deal with potential wills variation concerns
- Advising clients on the enhanced legal status of common-law partners, which can have an impact on family situations that were not previously affected
- Drafting representation agreements for highly acrimonious family situations
- Arranging transfer of assets through living or inter-vivos arrangements
- Ensuring that you or your family members have plans in place to deal with the possibility of a temporary or permanent incapacity
- Assisting individual executors and trust company professionals in all areas of estate administration
- Working with married, common-law and same-sex couples to determine legal rights and obligations relating to insurance and pension benefits
- Recording and storing all documents in a fireproof room where they will be kept safe
- Creating wealth planning solutions that incorporate clients' business interests

- Working closely with your other professional advisors, such as your accountant and financial advisor

TYPICAL SITUATIONS

- A business owner wants to ensure that the wealth he has built is maximized when he leaves it to his heirs and that taxes and probate fees are minimized
- A community leader decides to leave a significant amount of her estate to her favourite charity so she can leave a legacy that will benefit hundreds of people, and she wants to set up a trust to manage the funds
- A parent is diagnosed with early-onset dementia. He and his children decide that a lasting power of attorney should help as his illness progresses
- A couple who have built up their wealth together want to ensure that the wealth is protected and preserved for their children and the surviving spouse in case of the premature death of one of them

RECOGNITIONS

Harper Grey receives the TAGLaw Membership Award of Distinction acknowledging 15 years of outstanding service

19 Harper Grey lawyers recognized as “Leading Practitioners” by Canadian Legal Lexpert Directory®, 2021

Martindale Hubbell® recognizes 13 Harper Grey lawyers across 27 practice areas

29 Harper Grey lawyers recognized across 19 specialty areas by Best Lawyers® in Canada, 2020

Harper Grey recognized as a Top 10 Regional Firm in British Columbia, Alberta and the Territories by Canadian Lawyer Magazine, 2012 and 2014

COMMENTARIES

"The Harper Grey team is a well-oiled machine. All the lawyers I deal with are well-trained and hardworking. They communicate well and are always available for questions."

— *Benchmark Canada® 2020*

"These lawyers are all subject matter experts, and leader in their field, whose knowledge and skill are matched by their excellent client service."

— *Benchmark Canada® 2020*

"They exceeded my expectations. I am very satisfied with their work and very happy to recommend them."

— *Chambers Canada® 2017*

"Harper Grey is one of the best firms in Vancouver. They have excellent service, knowledge and their cost structure is excellent."

— *Benchmark Canada® 2017*

"Harper Grey has niches, and in those niches they are the best of the best."

— *Benchmark Canada® 2017*

"The firm has real quality people, and they've put three people on the bench there in six years."

— *Benchmark Canada@ 2015*

"Harper Grey lawyers are 'dedicated to their clients and focused on finding and implementing practical solutions for them. The lawyers are prompt, intelligent and insightful, and provide a high level of customer service'."

— *2012 Canadian Lawyer Magazine@ Embracing Regionalism - Canadian Lawyer's Top 10 firms from B.C., Alberta, and the Territories are in the Sweet Spot Right Now, October 1, 2012*

"Harper Grey has a stellar pedigree as a litigation firm, and they've put a ton of people on the bench, observes one peer."

— *Benchmark Canada@ 2014*

"Every day it seems like I am dealing with someone at Harper Grey, and I always find them professional, courteous and effective."

— *Benchmark Canada@ 2017*

"Clients are comforted by the firm's long history in BC. We're steeped in the region. Our connection is such that we have knowledge of not only the issue itself, but the history of the issue in the province." – Richard Bereti

— *2012 Canadian Lawyer Magazine@ Embracing Regionalism - Canadian Lawyer's Top 10 firms from B.C., Alberta, and the Territories are in the Sweet Spot Right Now*

"A Vancouver staple, Harper Grey is perhaps the most BC-centric of the "highly recommended" firms, owing largely to the firm's bench strength in several key areas."

— *Benchmark Canada@ 2017*

"A lawyer who refers work to Harper Grey wrote it has 'great service, a breadth of practice and I have never received a negative comment from referrals to the firm'."

— *2014 Canadian Lawyer Magazine@ Stronger than Ever - Top Western & Northern Firms, September 1, 2014*

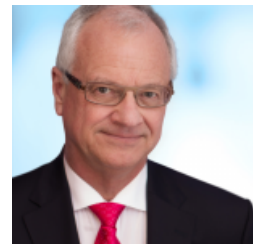
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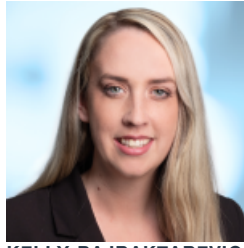


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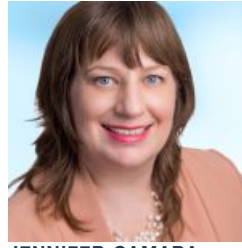


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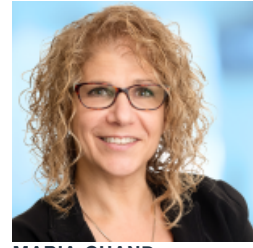
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SELECT ARTICLES + PUBLICATIONS

Rose Shawlee publishes helpful “What to Know Before Using a Power of Attorney” User Guide

Published to: Harper Grey Resource Hub

Written by: Rose Shawlee

Commentary on Digital Wills Co-Authored by Rose Shawlee and Samantha Norton Referenced in Canadian Lawyer Magazine Article

Published in: Canadian Lawyer Magazine

Written by: Rose Shawlee

Mondaq republishes Scott Marcinkow’s article discussing BC Employment Standards Act amendments

Published by: Mondaq

Written by: Scott J. Marcinkow*

Updating Your Estate Information During COVID-19

Published to: Harper Grey Resource Hub

Written by: Rose Shawlee

“In Trust Accounts: the Good, the Bad and the Ugly” re-published in CALU InfoExchange Newsletter

Published in: CALU InfoExchange Newsletter

Written by: Sandra Abley, JD, CFP®, TEP, Mollie Clark

STEP Newsletter Publishes Article Co-Authored by Sandy Abley and Mollie Clark

Published in: STEP Newsletter

Written by: Sandra Abley, JD, CFP®, TEP, Mollie Clark

“Ethics for Trust and Estate Practitioners: Managing Conflicts of Interest” Article

Published In: CBABC BarTalk Magazine - Apr.15

Written by: Roselle P. Wu

SELECT EVENTS + PRESENTATIONS

Harper Grey Hosts “Ask Us Anything: Working from Home”

Event Date: 21.Jul.21

Presented by: Scott J. Marcinkow*, Rose Keith, QC*, C. Ryan Chan, Neal Parker, Jeanne O. Posey

Rose Shawlee to take part in upcoming panel hosted by the Royal Columbian Hospital Foundation

Event Date: 19.May.21

Presented by: Rose Shawlee

Rose Shawlee to present at CLEBC “Wills and Estates Basics for Paralegals and Legal Support Staff 2021” Webinar

Event Date: 26.Apr.21

Presented by: Rose Shawlee

Rose Shawlee to present at upcoming Estate Planning Council of Canada Virtual Event

Event Date: 25.Mar.21

Presented by: Rose Shawlee

Rose Shawlee to present at upcoming CBA WLF section meeting

Event Date: 9.Dec.20

Presented by: Rose Shawlee

Rose Shawlee to present at Estate Planning Seminar hosted by Vancity

Event Date: 12.Nov.20

Presented by: Rose Shawlee

Rose Shawlee to present Estate Planning Seminar to Dignity Memorial

Event date: 24.Sept.20

Presented by: Rose Shawlee

Rose Shawlee to present at Prescribed Rate Lending seminar

Event date: 19.Jun.20

Presented by: Rose Shawlee

Rose Shawlee to present in virtual seminar addressing the importance of estate planning

Event date: 21.May.20

Presented by: Rose Shawlee

Sandra Abley and Erin Hatch to co-present Estate Planning and Litigation Tips and Traps

Presentation date: 13.Feb.20

Presented by: Sandra Abley, JD, CFP®, TEP, Erin Hatch

Sandy Abley to present Advance Care Planning Toolkit for Lawyers at CBA Wills and Estates Subsection Meeting

Presentation date: 26.Nov.19

Presented by: Sandra Abley, JD, CFP®, TEP

Sandy Abley to speak on Changes to Law Society Rules at upcoming CBA Wills and Estates Subsection Meeting

Event date: 29.Oct.19

Presented by: Sandra Abley, JD, CFP®, TEP

Erin Hatch presents “A View from an Estate Litigator: Planning Tips to Avoid Estate Litigation Pitfalls”

Presented by: Erin Hatch

Sandra Abley, Erin Hatch and Roselle Wu to attend 2019 CBABC Wills and Trusts Conference

Event date: 20.Sept.19

Presented by: Sandra Abley, JD, CFP®, TEP, Erin Hatch, Roselle P. Wu

Sandra Abley presents “Estate Planning Tips and Traps”

Presentation date: 05.Sept.19

Presented by: Sandra Abley, JD, CFP®, TEP

Michael Drouillard and Sandra Abley to attend 2018 Manufactured Home Park Owners Alliance of British Columbia AGM

Presentation date: 21.Sept.18

Presented by: Michael Drouillard, Sandra Abley, JD, CFP®, TEP

Erin Hatch to present a case comment on the recent decision in “Cooper-Smith v. Morgan” at CBABC Wills and Trusts Section Meeting

Presentation Date: 27.Feb.18

Presented by: Erin Hatch

Erin Hatch will be presenting a case comment at upcoming CBABC Vancouver Wills and Trusts Section meeting

Presentation Date: 12.Apr.16

Presented by: Erin Hatch

Bill MacRae presents Wills & Estates Seminar to WOWRide’s Cycling Club

Presentation Date: 7.Oct.15

Presented by: William D. MacRae*

SELECT NEWS

Harper Grey lawyers receive 58 rankings from Best Lawyers® in Canada 2022

Related to: Steven Abramson*, Owais Ahmed*, H. Roderick Anderson*, Bryan G. Baynham, QC, Richard E. Bereti*, Salman Y. Bhura*, Guy P. Brown, QC*, William S. Clark*, Prentice Durbin*, Cameron B. Elder*, Kimberly J. Jakeman*, Steven G. Lukas*, Maureen L.A. Lundell, QC, William D. MacRae*, Scott J. Marcinkow*, Jonathan D. Meadows*, David W. Pilley, Una Radoja*, Daniel J. Reid, Christopher M. Rusnak, QC*, Rose Shawlee, John P. Sullivan*, W. Sean Taylor, Michael G. Thomas*, Abigail C.F. Turner*, Adam R. Way, Jennifer R. Woznesensky, Lara C. Zee - 26.Aug.21

Rose Shawlee to speak on Lori Pinkowski’s Radio Show

Related to: Rose Shawlee - 08.Mar.21

Harper Grey welcomes Jeanne Posey

Related to: Jeanne O. Posey - 08.Feb.21

Jennifer Camara successfully completes STEP Canada Assessment Exam

08.Dec.20

Harper Grey receives 51 rankings from Best Lawyers® in Canada 2021

Related to: Steven Abramson*, Owais Ahmed*, H. Roderick Anderson*, Bryan G. Baynham, QC, Richard E. Bereti*, Salman Y. Bhura*, Guy P. Brown, QC*, William S. Clark*, Prentice Durbin*, Cameron B. Elder*, Michael J. Hewitt*, Kimberly J. Jakeman*, Steven G. Lukas*, Maureen L.A. Lundell, QC, William D. MacRae*, Derek Mah*, Jonathan D. Meadows*, David W. Pilley, Una Radoja*, Christopher M. Rusnak, QC*, Raj Samtani*, John P. Sullivan*, W. Sean Taylor, Michael G. Thomas*, Nigel L. Trevethan*, Abigail C.F. Turner*, Adam R. Way, Jennifer R. Woznesensky, Lara C. Zee - 27.Aug.20

Rose Shawlee interviewed by Global TV News regarding probate during COVID-19

Related to: Rose Shawlee - 04.May.20

Harper Grey welcomes Rose Shawlee

Related to: Rose Shawlee - 06.Apr.20

COVID-19 Weekly Wrap Up – March 30 – April 3

Related to: Trudy Hopman*, Rose Keith, QC*, Michael Drouillard, Scott J. Marcinkow*, C. Ryan Chan, Deanna Froese - 03.Apr.20

Have You Downloaded the Lawyer's Toolkit for Advance Care Planning Yet?

Related to: Kimberly J. Jakeman*, Sandra Abley, JD, CFP®, TEP - 27.Nov.19

Harper Grey Collaborates with CHPCA in Development of Lawyers' Toolkit for Advance Care Planning

Related to: Sandra Abley, JD, CFP®, TEP, Kimberly J. Jakeman* - 25.Nov.19

Harper Grey receives 48 rankings from Best Lawyers® in Canada 2020

Related to: Sandra Abley, JD, CFP®, TEP, Steven Abramson*, Owais Ahmed*, Bryan G. Baynham, QC, Richard E. Bereti*, Salman Y. Bhura*, Guy P. Brown, QC*, William S. Clark*, Prentice Durbin*, Michael J. Hewitt*, Kimberly J. Jakeman*, Steven G. Lukas*, Maureen L.A. Lundell, QC, William D. MacRae*, Derek Mah*, Jonathan D. Meadows*, David W. Pilley, Una Radoja*, Christopher M. Rusnak, QC*, Raj Samtani*, John P. Sullivan*, W. Sean Taylor, Michael G. Thomas*, Nigel L. Trevethan*, Abigail C.F. Turner*, Henning W. Wiebach*, Jennifer R. Woznesensky, Lara C. Zee - 21.Aug.19

Sandra Abley elected as Chair of the CBA Wills & Estates Subsection

Related to: Sandra Abley, JD, CFP®, TEP - 05.Sep.18

Sandra Abley and Erin Hatch to be interviewed on Fairchild Radio

Related to: Sandra Abley, JD, CFP®, TEP, Erin Hatch - 30.Aug.18

Sandy Abley and Bill MacRae Support Make A Will Week

Related to: Sandra Abley, JD, CFP®, TEP, William D. MacRae* - 27.Mar.18

Harper Grey warmly welcomes four new partners

Related to: Prentice Durbin*, Una Radoja*, Roselle P. Wu, Kim J. Yee - 18.Jan.18

Sandra Abley quoted in Advisor.ca article

Published by: Advisor.ca - 14.Nov.17

Related to: Sandra Abley, JD, CFP®, TEP - 17.Nov.17

Sandra Abley appointed Vice-Chair of the CBA Wills & Trusts Subsection

Related to: Sandra Abley, JD, CFP®, TEP - 24.Jul.17

16 Harper Grey lawyers recognized for litigation expertise by Benchmark Canada® 2017

Related to: H. Roderick Anderson*, Bryan G. Baynham, QC, Salman Y. Bhura*, Guy P. Brown, QC*, Karen F. Douglas*, Kimberly J. Jakeman*, James M. Lepp, QC, Barbara J. Norell, QC, Terrence L. Robertson, QC, Christopher M. Rusnak, QC*, John P. Sullivan*, Michael G. Thomas*, Nigel L. Trevethan*, Abigail C.F. Turner*, Jennifer R. Woznesensky, Jonathan D. Meadows* - 11.May.17

Harper Grey welcomes Sandra Abley, JD, CFP®, TEP as Associate Counsel

Related to: Sandra Abley, JD, CFP®, TEP - 21.Apr.17

Martindale-Hubbell® recognizes 14 Harper Grey lawyers

Related to: Bryan G. Baynham, QC, John B. Brown*, Guy P. Brown, QC*, Karen F. Douglas*, Steven G. Lukas*, Maureen L.A. Lundell, QC, William D. MacRae*, L. Neil Matheson, QC*, Barbara J. Norell, QC, David W. Pilley, Terrence L. Robertson, QC, Abigail C.F. Turner*, Henning W. Wiebach* - 30.Jan.17

Roselle Wu appointed Chair of the CBABC Wills and Trusts Section

Related to: Roselle P. Wu - 01.Sep.15

Michael Brown joins Harper Grey's Business Law and Wills & Estates Groups

Related to: Michael Brown - 26.Jun.15

SELECT NEWSLETTERS + UPDATES

Rose Shawlee releases "Beyond the Basics in BC" Estate Planning & Wealth Preservation Update in support of BC Make a Will Week 2020

Published in: Estate Planning and Wealth Preservation Update: 05.Oct.20

Written by: Rose Shawlee

Estate Planning and Wealth Preservation Update: Virtual Wills and Witnessing Beyond COVID-19

Published in: Estate Planning and Wealth Preservation Update: 25.Jun.20

Written by: Rose Shawlee

The Powers That Be: How to Use Your Power of Attorney

Published in: Estate Planning and Wealth Preservation Update: 04.Sept.19

Written by: Sandra Abley, JD, CFP®, TEP

In Trust Accounts: the Good, the Bad and the Ugly

Published In: Estate Planning And Wealth Preservation Update

Written by: Sandra Abley, JD, CFP®, TEP

Enduring Power of Attorney Agreements

Published in: Estate Planning and Wealth Preservation Update: 25.Sept.18

Written by: Sandra Abley, JD, CFP®, TEP

Estate Litigation Primer: Wills Variation Overview

Published in: Estate Planning and Wealth Preservation update Update - 01.May.18

Written by: Sandra Abley, JD, CFP®, TEP, Erin Hatch

Planning for Medical Assistance in Dying

Published in: Estate Planning and Wealth Preservation Update - 08.Mar.17

Written by: Sandra Abley, JD, CFP®, TEP, Dionne H. Liu

Do Not Delay, Sometimes It Can Be Too Late

Published in: Estate Planning and Wealth Preservation Update - 25.Jan.18

Written by: Sandra Abley, JD, CFP®, TEP

The Financial Abuse of Seniors

Published In: Estate Planning & Wealth Preservation Update - 09.Nov.17

Written by: Sandra Abley, JD, CFP®, TEP, Roselle P. Wu

Protecting Gifts to Adult Children

Published in: Estate Planning & Wealth Preservation Update - 19. Sep.17

Written by: Sandra Abley, JD, CFP®, TEP, Maureen L.A. Lundell, QC

What Are Probate Fees & Should You Try To Avoid Them?

Published in: Estate Planning and Wealth Preservation Update - 05.Jul.17

Written by: Sandra Abley, JD, CFP®, TEP

Executor held Financially Responsible for the Mismanagement of an Estate

Published in: Estate Planning and Wealth Preservation Update - 01.May.17

Written by: Sandra Abley, JD, CFP®, TEP