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Susannah B. Roth

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Areas of Practice

- Estate Planning
- Trust Planning
- Will Planning
- Incapacity Planning
- Trust and Estate Administration
- Advice to Executors and Trustees, Attorneys, Guardians and Representatives
- Estate Dispute Resolution
- Real Estate Conveyancing and Rectification

Bar Admissions

- Ontario, 2002

Education

- **Queen's University, Faculty of Law, Kingston, Ontario, Canada**
  - L.L.B. - 2001
- **McGill University, Montreal, Quebec, Canada**
  - B.A. (Hons.) - 1998

Overview

Susannah Roth's practice has focussed on trusts and estates law since her call to the bar in 2002. Susannah has experience in estate planning (including wills, powers of attorney, insurance and testamentary trusts), estate administration (including advising attorneys and guardians of property, executors, administrators and beneficiaries, and real estate transfers and rectification) and estate litigation.

Susannah graduated from McGill University with an Honours B.A. in English Literature, and from Queen's University with a LL.B. She was called to the bar in Ontario in 2002, and her practice has focused on wills, trusts, estates and estate administration since her call.

Awards and Accolades

- 2017, STEP Advanced Certificate in Cross-Border Estates
- 2011 recipient of the Ontario Bar Association's **Heather McArthur Memorial Young Lawyers Award,** which recognizes exceptional contributions and/or achievements in continuing legal education or the development of the law for the benefit of the profession or the citizens of Ontario.

Presentations and Publications

Upcoming

Speaking at The Annotated Will 2019 at Law Society of Ontario on January 16, 2019

Speaking at Lunch Seminar at Canaccord Genuity Wealth & Estate Planning Services on January 23, 2019

Past Presentations & Articles

Susannah attending the Estates & Trusts Practitioners' Forum on November 4 – 6, 2018

Susannah speaking at Estates and Trusts Summit at the Metro Toronto Convention Centre on October 11, 2018.

Susannah speaking at STEP Toronto on Dealing with Challenges in Will and Trust Administration on October 10, 2018.

The Lawyer's Daily, Wills, Trusts & Estates "Cross-border estate administration: The U.S.-Ontario mix" **September 24, 2018.** This article was originally published by The Lawyer's Daily (www.thelawyersdaily.ca), part of LexisNexis Canada Inc.

Susannah attending STEP Global Congress in Vancouver on September 13-14, 2018.

The Lawyer's Daily, Wills, Trusts & Estates "Cross-border estate administration:The two-country connection" **September 11, 2018** This article was originally published by The Lawyer's Daily (www.thelawyersdaily.ca), part of LexisNexis Canada Inc.

The Lawyer's Daily, Wills, Trusts & Estates "Cross-border estate administration: U.S. beneficiaries" **Aug 28, 2018**

The Lawyer's Daily, Wills, Trusts & Estates "Cross-border estate administration: It's complicated" **August 15, 2018** This article was originally published by The Lawyer's Daily (www.thelawyersdaily.ca), part of LexisNexis Canada Inc.

The Lawyer's Daily, Wills, Trusts & Estates "Planning for succession of a cottage or vacation home: Matrimonial issues" **June 13, 2018**

Susannah speaking at The South Leaside Group on June 4, 2018.

The Lawyer's Daily, Wills, Trusts & Estates "Planning for succession of a cottage or vacation home: Consider the taxes" **June 4, 2018**

Susannah speaking on Estate Planning and Update on the Land Transfer Tax in Ontario at STEP Annual Conference in Toronto on May 29, 2018.

The Lawyer's Daily, Wills, Trusts & Estates "Planning for succession of a cottage or vacation home: Getting personal" **May 28, 2018**

Susannah speaking on Estate and Tax Planning for Canadians with U.S. Connections at Manulife on March 28, 2018

The Lawyer's Daily, Wills, Trusts & Estates " More property in foreign jurisdictions complicates estate planning " **February 12, 2018**

Presenting at STEP Toronto Program: Legal & Case Law Update on January 17, 2018

Co-chairing Law Society of Ontario Annotated Will program on January 15, 2018

Estates Trusts & Pensions Journal, "**Informal Fiduciary Accounting: Who, What, When, Where and Why**" Vol. 37, 2017

Attending Cambridge Forum November 5-7, 2017

Not All Accounting Is Created Equal - The Unique Features Of Fiduciary Accounting June 29, 2017.

Canada-U.S. Cross Border Estate Planning Issues, National Bank Toronto, June 7, 2017

CIBC Trust Seminar: Appointing a U.S. resident/citizen as an executor or trustee and special issues for Canadian executors of estates with U.S. assets, Toronto, May 30, 2017.

Provincial Land Transfer Tax and Trust Planning, May 2017

Ontario Bar Association seminar: *Dealing with Real Property in Trusts and Estates Contexts*, Toronto, April 25, 2017

The Lawyers Weekly, Focus (Personal Injury) published by LexisNexis Canada Inc." Understating Cost of Guardians " **February 3, 2017**

Law Society of Ontario, Program Co-chair and Presenter: ***The Annotated Will 2017*** , Toronto, January 12, 2017

Osgoode Professional Development, Certificate in Elder Law program, "Advance Care Planning / Drafting Powers of Attorney for Personal Care and Interpreting Powers of Attorney for Personal Care - Views from Both Sides", Co-presenter, Toronto, May 10, 2016

Commons Institute webcast program: *Advanced Topics in Wills and Estates Law 2016*, Toronto, February 11, 2016

C. Markou and S. Roth, **" Challenging Estate Planning Issues,"** OBA Estate Planning Seminar, Toronto, September 29, 2015

Canadian Bar Association: **"Complex Passings of Accounts,"** Toronto, November 25, 2014

57th AGM of The Funeral Advisory and Memorial Society, Toronto, June 1, 2014

The Commons Institute, Practice Workshops for the Female Lawyer: **"Uptown Girl: Career Progression and The Small Firm Experience,"** December 2, 2013

Ontario Bar Association Professional Development, Program Chair: " **Trusts & Estates Law: Tax Update,**" March 25, 2013

Law Society of Ontario Estates and Trusts Summit, " **An Update to Estate Accounting Issues,**" November 15, 2012

Ontario Bar Association CLE, " **Conducting Your First Client Meeting**," November 1, 2012

Ontario Bar Association CLE, " **Standard Powers of Attorney,**" September 27, 2012

Ontario Bar Association, Young Lawyers Division, " **Excelling at Articles** - **Mentorship,**" August 22, 2012

Ontario Bar Association Professional Development, Program Chair: " **Trusts and Estates: Income Tax Update,**" March 27, 2012

Ontario Bar Association, *Deadbeat*, Vol. 31, No. 1, The Trusts & Estates Section Newsletter, " **Certificate Not Required for Mortgage Held by Deceased if Discharged,**" March 2012

Ontario Bar Association, " **Trusts and Estates: The Nuts and Bolts of Bonding,**" November 29, 2011

Ontario Bar Association, Young Lawyers Division, " **Excelling at Articles** - **Mentorship,**" August 24, 2011

Ontario Bar Association Professional Development, Program Chair: " **Will and Estate Planning Essentials,**" May 10, 2011

Ontario Bar Association magazine, Briefly Speaking - Student Edition 2011, article " **Mandatory Professional Development is Here**"

Ontario Bar Association magazine, Briefly Speaking, December 2010, article " **Mandatory CLE is Here Are You Ready?** "

Law Society of Ontario Estates and Trusts Summit, " **Executor's Compensation,**" November 17, 2010

Ontario Bar Association, Young Lawyers Division, " **Excelling at Articles - Mentorship,**" August 26, 2010

Ontario Bar Association, " **Succession Planning: A Primer,**" December 9, 2009

Ontario Bar Association, Networking and Mentorship, " **Excelling at Articles,**" August 27, 2009

Ontario Bar Association, several articles in *Deadbeat*, The Trusts & Estates Section Newsletter

Estates, Trusts & Pensions Journal, " **Indemnify Me! Examining the Principle That the Cost of Preparing Executor's Accounts is Always a Personal Expense of the Executor,**" Vol. 29, 2009

Estates, Trusts & Pensions Journal, " **Costs Incurred in Collecting Executor's Compensation,**" Vol. 28, 2009

Ontario Bar Association, " **Clients, Clients Everywhere III,**" November 5, 2008

Ontario Bar Association, " **Dress for Success,**" October 15, 2008

Ontario Bar Association, " **3rd Annual Tips and Traps on the Road to Finding Your Dream Job,**" January 15, 2008

Ontario Bar Association dinner, " **Environmental Law Practice Tips and Tools Round Table,**" November 1, 2007

Ontario Bar Association, " **Starting Out and Marketing Your Niche Practice,**" October 2, 2007

Ontario Bar Association, " **2nd Annual Tips and Traps on the Road to Finding Your Dream Job,** " March 8, 2007

Ontario Bar Association, " **How to Speak and Write So Others Will Listen and Read,**" February 5, 2007

Ontario Bar Association, Executors, Administrators, and Estate Trustees, Oh My! An Overview of Applications for Probate, Administration and Others, " **Death Takes a Client: Your First Estate Administration,**" October 19, 2006

Ontario Bar Association, Trusts & Estates Section Program - " **Solicitor's Negligence, LawPRO, Avoid Liability - What Solicitors Must Know,**" Case Comment: *Webster* v. *Webster Estate*, September 26, 2006

Ontario Bar Association, " **Clients, Clients Everywhere,**" July 12, 2006

Professional Activities

- Member, Society of Trust and Estate Practitioners
- Member, Ontario Bar Association Council
- Past Chair, Ontario Bar Association Trusts & Estates Section Executive
- Past Chair, Ontario Bar Association Young Lawyers' Division Executive Committee
- Member and Past Co-Chair, Ontario Bar Association Young Lawyers' Division Continuing Legal Education Committee