

A professional headshot of Susannah Roth, a woman with short reddish-brown hair, wearing a dark blazer and hoop earrings, set against a blurred background of bookshelves.

# Susannah Roth

**PARTNER**

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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

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- Estate Dispute Resolution
  - Real Estate Conveyancing and Rectification
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## BAR ADMISSION

Ontario, 2002

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## EDUCATION

**Queen's University, Faculty of Law**, Kingston, Ontario, Canada

- LL.B. - 2001

**McGill University**, Montreal, Quebec, Canada

- B.A. (Hons.) - 1998

Susannah B. Roth



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## Overview

Susannah Roth's practice has focused 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

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- Recognized in the 2019 Edition of ***The Canadian Legal Lexpert Directory*** as a **Leading Practitioner** in Estate & Tax Planning (Repeatedly Recommended) and Estate Litigation (Repeatedly Recommended)
  - 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.

## 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

## Presentations

### *Upcoming*

Susannah is presenting at the OBA Elder Law Passport Series on Capacity: Client Capacity in a Legal Retainer on September 18, 2019.

O'Sullivan Estate Lawyers LLP are finalist for the 2019/20 STEP Private Client Awards on September 25, 2019 in London, UK

O'Sullivan Estate Lawyers is hosting a webinar on the topic Protecting a Child's Inheritance to be held on October 24, 2019

### *Recent*

Presenting at Manulife's Tax & Estate Planning team's technical session on Tuesday, June 4, 2019

**Susannah co-presented at the Professional Accountants PD Network on February 5, 2019 on executor and trustee responsibilities and compensation.**

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

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**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.**

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

Susannah speaking at The South Leaside Group on 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.

**[Susannah speaking on Estate and Tax Planning for Canadians with U.S. Connections at Manulife](#) on March 28, 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**

Attending Cambridge Forum November 5–7, 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.

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

## Publications

*Recent*

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*The Lawyer's Daily, Wills, Trusts & Estates* "[Powers of attorney and advanced care planning: Disability](#)" on July 24, 2019. This article was originally published by The Lawyer's Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.

*The Lawyer's Daily, Wills, Trusts & Estates* "[Powers of attorney and advanced care planning: Property](#)" on July 31, 2019. This article was originally published by The Lawyer's Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.

Susannah Roth, "[Planning with multiple wills](#)" STEP Journal (Vol27 Iss4), pp.33-35

Susannah Roth, "[co-authored article titled Disclosure of Beneficial Ownership of Real Property in Ontario and British Columbia](#)," STEP Inside (Vol18 No.2), pp.10-11

Susannah Roth, "[Simplicity vs. Oversimplicity in Estate Planning](#)", *inFocus Newsletter*, Fall 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](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.

*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](http://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](http://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**

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

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

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

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

[Not All Accounting Is Created Equal – The Unique Features Of Fiduciary Accounting June 29, 2017.](#)

[Provincial Land Transfer Tax and Trust Planning, May 2017](#)

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

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