



RSS
avocats  lawyers

Estates, Wills and Trusts

Montreal

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About Us



Our specialized team of lawyers and notaries provides our clients with practical solutions for asset preservation and succession.

With extensive experience in intergenerational asset transfers, our diverse team offers a full range of estate and trust services, including support for administrators of the property of others (liquidators, trustees, guardians, agents, etc.).

As part of their estate and trust planning, our professionals specializing in estates, wills, and trusts provide advice to:

- Families
- Individuals
- Partners
- Charitable organizations
- Private trust companies

We offer **strategies** which address all matters related to **wealth management; estate litigation; dispute resolution; local, national, and international tax planning; incapacity; and elder law.**

Our Services



INTERGENERATIONAL ASSET TRANSFERS

We advise our clients on the development and implementation of tax-efficient strategies to facilitate intergenerational asset transfers, both nationally and internationally.

CROSS-BORDER ESTATE PLANNING

We design estate planning strategies for clients with interests in various jurisdictions, taking into account their families' specific needs and challenges while minimizing tax impacts and ensuring compliance with the laws of the states where their families reside and hold assets. Our international network of lawyers and notaries ensures seamless coordination across jurisdictions.

ESTATE DOCUMENTS

Our professionals draft customized wills, trust deeds and other testamentary documents—including death-related gifts within marriage or civil union contracts, powers of attorney, and protection mandates—all of which are key elements of sound planning for death or incapacity.

We are at the forefront of knowledge regarding the use of trusts to protect family assets or achieve business or philanthropic goals.

SPECIAL NEEDS CLIENTS AND ELDERLY CLIENTS

Our estate planning strategies are tailored to the specific needs of each client, including those with children or grandchildren who have special needs. Our team also includes a recognized elder law expert.

FAMILY LAW

Our Estates, Wills, and Trusts Group includes members from our renowned team of family law lawyers. This allows us to advise our clients on matters related to matrimonial regimes, family assets and support obligations.

Our Services



BUSINESS SUCCESSION

We advise family business owners, drawing on our experience to create estate plans that ensure the smooth transition of management and shares across generations. Our approach allows for the integration of the new generation while the previous one maintains control of the company. Additionally, we draft shareholder agreements that reflect family obligations and protect the business.

PHILANTHROPY

We advise individuals and their families who wish to give back to the community through charitable donations. We also assist them in establishing private foundations that are recognized as charitable organizations by tax authorities.

REPRESENTATION OF ADMINISTRATORS OF THE PROPERTY OF OTHERS

We frequently collaborate with trust companies and individuals acting as liquidators, agents, trustees, and guardians to advise them on their roles and obligations and address the complex issues that arise in the course of their duties. We also act as administrators of the property of others.

DISPUTE RESOLUTION

We have gained valuable experience in dispute resolution, thereby avoiding court proceedings. However, when circumstances require it, we entrust the matter to litigators with proven expertise in the courtroom. They are adept at contesting wills, trusts, and protection mandates, and often present motions to modify or dissolve trusts, remove, replace, or appoint liquidators and trustees, or seek declaratory judgments on the interpretation of wills or trust deeds.

We also handle non-contentious matters, such as the validation of wills, the probate of protection mandates, and the establishment of tutorships.

Our Professionals

Marilyn's practice focuses on wealth management, estates and trusts, regimes of protective supervision, and elder law. She serves as counsel to private clients, trust companies and philanthropists, as well as individual and institutional trustees.

Recognized as an authority in trusts and estates, wealth management and tax planning, Marilyn is also well-known for her ability to communicate with an extensive network of professionals, both in Canada and abroad, to meet her clients' needs.



**Marilyn Piccini-Roy, Ad. E., TEP
Lawyer, Partner and Head of the
Estates, Wills and Trusts Group**



**Martin Lord, M. Fisc., TEP
Lawyer, Partner**

Martin mainly works with businesspeople, assisting them with tax planning to help protect their assets and bequeath them to future generations through domestic trusts or wills. Martin also advises his clients on their legal and financial roles and obligations. He keeps them informed about the international aspects of their files where applicable, and on the ever-changing landscape of tax law.

Martin also acts as liquidator and trustee for various foundations and charities in mandates for the administration of the property of others.

Natacha's practice mainly focuses on divorces involving complex assets and sophisticated financial structures.

She has substantial experience with extra-provincial and international cases, where the family estate includes assets outside of Quebec. Natacha has also argued cases arising from conflicts over the homologation of protection mandates and estate liquidations.



**Natacha Calixte
Lawyer, Partner**

Our Professionals



William Dion-Bernard, TEP
Notary, Partner

William works regularly with property administrators, high-net-worth individuals, and families on estate- and tax-related issues.

He has extensive expertise in estate planning, liquidation and settlement. He regularly advises his clients on Quebec civil law trusts and foreign trusts, and assists wealthy individuals in structuring gifts of substantial assets with regard to taxation.

Adrien assists clients with specific patrimonial or personal needs. He provides support upstream through wills, marriage contracts, deeds of gift or family arrangement, and “Henson” type trusts. Downstream, he helps with the settlement of estates as the notary for the liquidator or directly as liquidator. Additionally, he manages trusts on a day-to-day basis and offers legal advice to trustees.



Adrien Tillet
Notary, Associate



Anaïs Kadian
Lawyer, Associate

Anaïs provides strategic counsel to individuals and institutions including estate liquidators, corporate directors, shareholders, construction contractors, property owners and condo syndicates.

With extensive experience in estate and trust litigation, Anaïs’ valuable expertise and pleading skills assist her clients in resolving conflicts and having their interests represented in court.

Our Professionals

Lauren's practice is centered on advocating for clients in complex estate and trust disputes, especially those involving issues of private international law and the interpretation or validity of wills.

In addition to her expertise in estates and trusts, Lauren is passionate about the protection of vulnerable and/or incapacitated individuals. She represents clients in contentious matters relating to the homologation of protection mandates and the opening and administration of guardianships.



Lauren Flam
Lawyer, Associate



Catherine Integlia
Notary, Associate

Catherine specializes in guiding liquidators, heirs, and other clients through the complexities of estate settlement and non-contentious proceedings, with assets located in Quebec, Canada, and internationally.



Barry H. Shapiro
Lawyer, Partner

Barry's practice focuses on mergers and acquisitions, business law, corporate law, real estate law, and wills and trusts.



Mylaine Viau
Paralegal

Mylaine assists the notaries and lawyers in our Estates, Wills, and Trusts Group with estate settlement matters. Notably, she conducts research and makes entries in various registers, and drafts legal documentation related to estate settlements.



Talia Ecityan
Notarial Intern

Over the course of Talia's notarial internship with us, she has contributed to estate planning and settlement files, as well as non-contentious proceedings, contributing to the management of client's assets. Additionally, she conducts specialized legal research in the areas of estates, trusts, protection of persons, and the administration of the property of others.

About RSS

Founded 100 years ago, Robinson Sheppard Shapiro is an **independent medium-sized law firm** providing **legal services and strategic advice** to **local, national and international clients**, including entrepreneurs, SMEs, insurers, corporations, private and public institutions, and individuals.

From our office in **Montreal**, our diverse team of lawyers adapts to the business realities of each client, offering high-level legal services while employing a personalized approach.

RSS at a Glance

- Legal and notarial services tailored to your needs
- Over 30% of our professionals are listed in prestigious legal directories
- 55% of decision-making positions are held by women
- Our foundation supports over 100 community organizations

CONTACT US

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