

# Roy Klassen

TEP

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## ASSISTANT

Kim Jamieson

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## PRACTICE AREAS

Wills, Trusts & Estates

Estate Planning

Estate Administration

Trust Planning

Guardianship & Trusteeship

Estate planning is the most essential yet overlooked way to preserve and enhance family wealth and harmony.

Roy is a partner and head of the Wills, Trusts & Estates group. With over 25 years of wealth management and protection experience, he advises high net worth individuals, their families, family offices, and related businesses. His focus is on international, U.S./cross-border planning, trust creation, and compliance.

Before joining McLeod Law in 2009, Roy worked as in-house legal counsel to major Canadian and international financial institutions, spending 10 years in Bermuda and Switzerland.

Roy is fluent in French and functional in German.

## Education

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**2001** Society of Trust and Estate Practitioners (STEP)

**1992** Université de Moncton, LLB

## Admissions

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**1993** Alberta

## Experience

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Premier advisor to mid to high net worth individuals and their families, businesses, and teams in trusts and estate administration, business succession, and incapacity planning.

Clients have highly recommended Roy, giving him a rating of 5 out of 5 on [Martindale Hubbell](#) and [Canadian-Lawyers.ca](#).

## Recognition

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### HONOURS AND AWARDS

- Client rating of 5/5 by [Martindale Hubbell](#) and [Canadian-Lawyers.ca](#)
- French Consul
  - Honorary Consul for France in Calgary, 2014-present

### RECENT MEDIA COVERAGE

- Quoted in "Baby Boom: Family Complications," The Financial Advisors Association of Canada, Forum, October 2015
- Interviewed in "[The three biggest hurdles to overcome in financial planning](#)," The Financial Post, April 27, 2015
- Interviewed in "[Parker: Calgary lawyer Roy Klassen builds French connections](#)," The Calgary Herald, November 25, 2014

### PUBLICATIONS

- "[The importance of succession planning](#)," *The Constructor*, Calgary Construction Association, March 2019

## Memberships

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- Law Society of Alberta
- Canadian Bar Association
  - Wills & Trusts Law Section (Southern Alberta Branch)
- Trust Institute Canada
- Society of Estates and Trusts Practitioners

## Community

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Calgary Accueil (French Expat Business Club)

- 2010-2014

Swiss Canadian Chamber of Commerce

- Director, 2009-2014

## Teaching Roles & Speaking Engagements

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### SPEAKING ENGAGEMENTS

#### PRESENTER

HOW TO AVOID LITIGATION RESULTING FROM TRAIN WRECK ESTATES

*McLeod Law LLP Wills, Trusts & Estates Update*, March 2019

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#### SESSIONAL INSTRUCTOR

TRUSTS AND EQUITY COURSE

*McGill University Faculty of Law (Montreal)*, Fall 2018

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#### SPEAKER

ELIZABETH'S LEGACY: THE SHORT (AND PAINFUL) HISTORY OF THE RULE AGAINST PERPETUITIES

*CBA Alberta (South) Wills and Trusts*, June 2017

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#### PRESENTER

ESTATE PLANNING FOR THE BLENDED FAMILY

*Legal Education Society of Alberta (LESA), 48th Annual Refresher Course*, April 2015

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**SPEAKER**

**TRUST DRAFTING TIPS & TRAPS - INCLUDING THE IMPACT OF US FAMILY MEMBERS**

*STEP Calgary, November 2013*

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**PRESENTER**

**PLANNING FOR THE AGING CLIENT**

*Legal Education Society of Alberta, 2012 (Edmonton & Calgary)*

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**PRESENTER**

**STAFF PRESENTATIONS AT VARIOUS FINANCIAL INSTITUTIONS**