

Roy Klassen

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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

2001 Society of Trust and Estate Practitioners (STEP)

1992 Université de Moncton, LLB

Admissions

1993 Alberta

Experience

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

HONOURS AND AWARDS

- Recognized by [The Best Lawyers in Canada](#) for work in Trusts and Estates (2024).
- Appointed Queen's Counsel by the Lieutenant Governor of Alberta, 2022; now known as King's Counsel as of September 2022.
- Clients highly recommend Roy, giving him a rating of 5 out of 5 on [Martindale-Hubbell.com](#).
- 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

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

Community

Conseiller au commerce extérieur (France)

Calgary Accueil (French Expat Business Club)

- 2010-2014

Swiss Canadian Chamber of Commerce

- Director, 2009-2014

Teaching Roles & Speaking Engagements

SPEAKING ENGAGEMENTS

PRESENTER

REMOTE WILLS AND ESTATES PLANNING: TIPS AND TRAPS

The Canadian Bar Association, March 2021

PRESENTER

HOW TO AVOID LITIGATION RESULTING FROM TRAIN WRECK ESTATES

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

SESSIONAL INSTRUCTOR

TRUSTS AND EQUITY COURSE

McGill University Faculty of Law (Montreal), Fall 2018

SPEAKER

ELIZABETH'S LEGACY: THE SHORT (AND PAINFUL) HISTORY OF THE RULE AGAINST PERPETUITIES
CBA Alberta (South) Wills and Trusts, June 2017

PRESENTER

ESTATE PLANNING FOR THE BLENDED FAMILY

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

SPEAKER

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

STEP Calgary, November 2013

PRESENTER

PLANNING FOR THE AGING CLIENT

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

PRESENTER

STAFF PRESENTATIONS AT VARIOUS FINANCIAL INSTITUTIONS