

# Shelley E. Waite

TEP, KC

Partner

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OFFICE: CALGARY SOUTH



## ASSISTANT

Tina Fisher

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## PRACTICE AREAS

Wills, Trusts & Estates  
Estate Planning  
Estate Administration  
Estate Dispute Resolution  
Trust Planning  
Guardianship & Trusteeship

I enjoy creating efficient solutions for client's succession concerns, from drafting their plan to navigating a family's contentious estate.

Shelley has a depth of knowledge in Wills, Trusts and Estates with a focus on:

- estate planning
- US/cross border planning
- estate administration
- estate dispute resolution
- elder law
- trust planning
- guardianship and trusteeship matters

She is adept at guiding clients smoothly through a process that can be stressful and complicated. She believes in educating people, creating efficient solutions that work for her client's specific concerns, and collaborating with their trusted professionals to resolve their personal estate matters.

Clients have highly recommended Shelley, earning a rating of 5 out of 5 ("Platinum") on [Martindale Hubbell](#) and [Lawyers.com](#). She is also

recognized by the [Canadian Legal Lexpert® Directory](#) as a leading practitioner in Estate & Tax Planning and by [The Best Lawyers in Canada](#) for work in Trusts and Estates.

## Education

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**2018** Executive Certificate in Conflict Management, University of Windsor, Faculty of Law

**2002** University of Calgary, LLB

**1998** Portland State University, BA (Honours)

## Admissions

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**2003** Alberta

## Experience

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As designated mediator and lawyer, Shelley is equipped to bring families together for either preventative strategy or to mediate any known disagreements.

In a family meeting, Shelley helps clients uncover any tensions or unknown expectations, pre or post estate planning. It's an effective exercise used to help prevent disagreements that could lead to litigation.

For clients with disputes or potential disputes in their family, Shelley offers her mediation services to guide the process for her client tactfully, and reach a resolution without having to go near a courtroom.

## Recognition

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### HONOURS AND AWARDS

- Appointed King's Counsel by the Lieutenant Governor of Alberta, 2024
- Shelley is recognized by *The Best Lawyers in Canada* for work in Trusts and Estates (2022-2024).
- Shelley is recognized by *The Canadian Legal Lexpert Directory* as a leading practitioner in Estate & Personal Tax Planning
- Clients highly recommend Shelley, giving her a rating of 5 out of 5 ("Platinum" rating) on *Martindale-Hubbell.com*.
- Volunteer of the Year, Glenlake Hockey Association

### RECENT MEDIA COVERAGE

- Interviewed in, "Canadian Life Insurers Want Different Treatment for Assisted Dying," *Life Pro News*, April 2016
- Interviewed on estate planning, *The Rutherford Show*, June 2013
- Quoted on the topic of wills and succession planning, *The Rutherford Show*, March 2012
- Quoted on the topic of succession planning, *CTV News*, March 2010
- Quoted on the topic of succession planning, *CBC Wildrose Country*, March 2009 and March 2010

- Quoted on the topic of succession planning, *Global News*, March 2010

## PUBLICATIONS

- “The Gift of Giving Back”, Avenue Magazine, March - April 2023
- “Cryptocurrency and death: Where’s your key?”, Concentra Insights, August 2020
- “Planning for Dependent Children,” Legal Education Society of Alberta, January 2018
- Elder Law, Legal Education Society of Alberta, May & June 2018
- “Prudent Practice for the Elderly Client,” Legal Education Society of Alberta, March 2016
- “Guardianship & Trustee,” Canadian Bar Association Health Law subsection, February 2018
- “Errors in Drafting,” Canadian Bar Association National Conference, October 2016
- “Drafting and Practice Considerations under the *Wills & Succession Act*: Controlling the Matrimonial Property Claim,” Legal Education Society of Alberta (LESA), Edmonton & Calgary, November 2011
- “Getting Started - Initial Points to Consider for the Wills and Estates Practitioner,” Legal Education Society of Alberta (LESA), Boot Camp, February 2009

## Memberships

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- Estate Planning Counsel of Canada (EPCC), 2023 - present
- Surrogate Rules Advisory Committee  
Committee Member, CBA Representative, 2022 - present
- Advance Care Planning (ACP) Alberta  
Advisory Committee Member, 2021-present
- Alberta Surrogate Rule  
Advisory Sub-Committee Member, 2020 to present
- Society of Estates and Trusts Practitioners (STEP)  
Trust and Estate Planner (TEP) designation (2012-present)
- Canadian Bar Association  
Honourary member-at-large, Executive Committee, Wills, Estates & Trusts Section - National (2019-2020)  
Executive Committee, Wills, Estates & Trusts Section - National, 6-year term  
End of Life Working Group (2016-2019)  
Chair, Wills, Estates & Trusts Section - National (2016-2017)  
Chair, Wills & Trusts Section - Southern Alberta (2010-2012)  
Committee member, Southern Alberta, *Wills & Succession Act* (2011-2012)  
Committee member, Southern Alberta, Wills & Trusts Law Section, *Adult Guardianship and Trusteeship Act* (2010-2011)
- Alberta Advance Care Planning, Collaborative Research and Innovation Opportunities (ACP CRIO) Research Program (2014-present)
- Leave A Legacy Calgary  
Former Executive Member (2004-2015)
- Canadian Association of Gift Planners  
Former Executive Member, Southern Alberta Round Table (2012)

## Community

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- Glenlake Hockey League  
Board member  
House League Tournament coordinator, 2014-2019

## Teaching Roles & Speaking Engagements

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### SPEAKING ENGAGEMENTS

#### Presenter

##### ESTATE PLANNING ESSENTIALS FOR ELDERLY CLIENTS

Legal Education Society of Alberta (LESA), October 2023

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#### Presenter

##### SURROGATE DIGITAL SERVICE

CBA Southern Alberta, October 2023

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#### Presenter

##### PLAN AHEAD ALBERTA

Webinar “Planning for Life’s Journey: connecting health, financial and estate planning in community education” Hosted by Palliative Care Canada, Covenant Health - Palliative Institute of Alberta, and Project Echo  
July 11, 2023

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#### Presenter

##### NEW *TRUSTEE ACT* BEST PRACTICES FOR LAWYERS AND TRUSTEES

Legal Education Society of Alberta (LESA), March 2023

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#### Presenter

##### PHILANTHROPY AND ESTATE PLANNING

Calgary Food Bank, October 2022

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#### Presenter and Co-Chair

##### BEST PRACTICES AND QUALITY CONTROL IN A PLANNING PRACTICE

LESA Banff Refresher: Wills and Estates, May 2022

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#### Facilitator

## COMMITTEE SESSION ON LEGAL, FINANCIAL PLANNING AND INSURANCE

Covenant Health Palliative Institute, April 2022

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### PRESENTER

#### BUILDING COMPASSIONATE COMMUNITIES: RAISING AWARENESS OF PALLIATIVE CARE AND ADVANCE CARE PLANNING IN ALBERTA FORUM

Covenant Health Palliative Institute, March 2022

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### PRESENTER

#### CONFLICT RESOLUTION AND MEDIATION IN GUARDIANSHIP & TRUSTEESHIP MATTERS

*Legal Education Society of Alberta - Adult Guardianship and Trusteeship Fundamentals Course, February 2019*

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### PRESENTER/MODERATOR

#### JOINT OWNERSHIP: LEGAL DEVELOPMENTS AND BEST PRACTICES

*CBA National Webinar, October 2018*

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### CHAIR & PRESENTER

#### ELDER LAW TOPICS

*Legal Education Society of Alberta (LESA), May 2018 (Calgary), June 2018 (Edmonton)*

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### PRESENTER

#### GUARDIANSHIP AND TRUSTEESHIP

*CBA Alberta Health Law Section - South Meeting, February 2018*

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### PRESENTER

#### ESTATE PLANNING FOR THE AVERAGE WEALTH CLIENT

*Legal Education Society of Alberta (LESA), November 2017, December 2017*

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### PRESENTER

#### MEDICAL ASSISTANCE IN DYING

*Society of Trust & Estate Planners (STEP), October 2017*

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### PRESENTER/MODERATOR

#### ELDER FINANCIAL ABUSE

*CBA National Webinar, June 2017*

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### PRESENTER

#### CAPACITY AND INFLUENCE

*Legal Education Society of Alberta (LESA), March 2017 (Calgary), March 2017 (Edmonton)*

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## PRESENTER

### MEDICAL ASSISTANCE IN DYING

*Calgary Estate Planning Council, March 2017*

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## PANELIST

### ADVANCE CARE PLANNING - HOW LAWYERS CAN HELP THEIR CLIENTS

*The Alberta Advance Care Planning CRIO Research Program, September 2015, February 2017*

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## PARTICIPANT

### ESTATE PLANNING & LITIGATION FORUM

*Cambridge Forums, April 2016, April 2017*

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## PRESENTER

### COMMON ERRORS IN WILL AND TRUST DRAFTING

*CBA National Will, Estate and Trust Fundamentals for Estate Practitioners, October 2016*

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## PRESENTER

### CAPACITY/DEMENTIA ISSUES OF AN AGING POPULATION

*Canadian Association of Gift Planners National Conference, April 2016*

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## PRESENTER

### ELDER ABUSE AND USE OF THE ALTER EGO TRUST

*Society of Trust & Estate Planners (STEP), April 2015*

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## SPEAKER

### WILLS & SUCCESSION ACT OF ALBERTA AND THE ADULT INTERDEPENDENT RELATIONSHIPS ACT

*Conciliation & Arbitration Board, Social Welfare Board, and Economic Planning Board, March 2015*

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## TEACHING ROLES

## ADJUNCT PROFESSOR

*Wills & Estates Class, University of Calgary, Faculty of Law, 2014*

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## SEASONAL LECTURER

### ESTATE PLANNING AND ADMINISTRATION

*Chinook Learning Services, Continuing Education, 2006-2009*

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## SEASONAL LECTURER

### ESTATE PLANNING AND ADMINISTRATION

Calgary Catholic School Board, 2005-2008

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## DEVELOPED COURSE MATERIAL

### BEING AN EXECUTOR PROGRAM

Chinook Learning Services, August 2009