

Shelley E. Waite

TEP

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OFFICE: CALGARY SOUTH



ASSISTANT

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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

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

2002 University of Calgary, LLB

1998 Portland State University, BA (Honours)

Admissions

2003 Alberta

Experience

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

HONOURS AND AWARDS

- 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

- 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

- Glenlake Hockey League

Board member
House League Tournament coordinator, 2014-2019

Teaching Roles & Speaking Engagements

SPEAKING ENGAGEMENTS

Presenter

ESTATE PLANNING ESSENTIALS FOR ELDERLY CLIENTS
Legal Education Society of Alberta (LESA), October 2023

Presenter

SURROGATE DIGITAL SERVICE
CBA Southern Alberta, October 2023

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

Presenter

NEW *TRUSTEE ACT* BEST PRACTICES FOR LAWYERS AND TRUSTEES
Legal Education Society of Alberta (LESA), March 2023

Presenter

PHILANTHROPY AND ESTATE PLANNING
Calgary Food Bank, October 2022

Presenter and Co-Chair

BEST PRACTICES AND QUALITY CONTROL IN A PLANNING PRACTICE
LESA Banff Refresher: Wills and Estates, May 2022

Facilitator

COMMITTEE SESSION ON LEGAL, FINANCIAL PLANNING AND INSURANCE
Covenant Health Palliative Institute, April 2022

PRESENTER

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

Covenant Health Palliative Institute, March 2022

PRESENTER

CONFLICT RESOLUTION AND MEDIATION IN GUARDIANSHIP & TRUSTEESHIP MATTERS

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

PRESENTER/MODERATOR

JOINT OWNERSHIP: LEGAL DEVELOPMENTS AND BEST PRACTICES

CBA National Webinar, October 2018

CHAIR & PRESENTER

ELDER LAW TOPICS

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

PRESENTER

GUARDIANSHIP AND TRUSTEESHIP

CBA Alberta Health Law Section - South Meeting, February 2018

PRESENTER

ESTATE PLANNING FOR THE AVERAGE WEALTH CLIENT

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

PRESENTER

MEDICAL ASSISTANCE IN DYING

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

PRESENTER/MODERATOR

ELDER FINANCIAL ABUSE

CBA National Webinar, June 2017

PRESENTER

CAPACITY AND INFLUENCE

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

PRESENTER

MEDICAL ASSISTANCE IN DYING

Calgary Estate Planning Council, March 2017

PANELIST

ADVANCE CARE PLANNING - HOW LAWYERS CAN HELP THEIR CLIENTS

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

PARTICIPANT

ESTATE PLANNING & LITIGATION FORUM

Cambridge Forums, April 2016, April 2017

PRESENTER

COMMON ERRORS IN WILL AND TRUST DRAFTING

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

PRESENTER

CAPACITY/DEMENTIA ISSUES OF AN AGING POPULATION

Canadian Association of Gift Planners National Conference, April 2016

PRESENTER

ELDER ABUSE AND USE OF THE ALTER EGO TRUST

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

SPEAKER

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

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

TEACHING ROLES

ADJUNCT PROFESSOR

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

SEASONAL LECTURER

ESTATE PLANNING AND ADMINISTRATION

Chinook Learning Services, Continuing Education, 2006-2009

SEASONAL LECTURER

ESTATE PLANNING AND ADMINISTRATION
Calgary Catholic School Board, 2005-2008

DEVELOPED COURSE MATERIAL

BEING AN EXECUTOR PROGRAM
Chinook Learning Services, August 2009