



## MAX S.J. SHILLETTO, ASSOCIATE

Max is an associate in the firm's Estate and Wealth Advisory Group. His preferred areas of practice are Estate Planning, Estate & Wealth Advisory, Wealth Preservation, and Business Succession.

He works closely with families and individuals through every step of the process to help them reach their goals and to plan for the future.

Max's intellectual curiosity drives him to constantly improve, adapt and better understand his practice to suit his clients' needs. Through his exposure to complex legal issues and interpersonal dynamics, he has developed specific planning strategies and structures with an eye to ensuring a client's assets are protected against unexpected issues.

### REPRESENTATIVE CLIENT WORK

- Work closely with clients to develop and implement comprehensive estate plans which include the use of multiple wills, powers of attorney, representation agreements, and inter vivos trust planning;
- Develop incapacity planning structures for financial, health and personal decision making;
- Implement and design corporate succession plans for transfers of intergenerational wealth, specifically designed to deal with multi-family issues, complex corporate and trust structures, and conflicting family expectations;
- Assist personal representatives (executors, administrators, and trustees) navigate all aspects of estate administration, including applications for Grants of Probate, working with the Public Guardian and Trustee, transmission of real estate and corporate shares, liquidating estate assets; working with accountants; payment of estate debts, consent and release of interim and final accounts, and distribution to beneficiaries; and
- Incorporation, share ownership, shareholders agreements, and management agreement.

#### Contact Info

Practicing From  
Vancouver Office  
Direct: 604.595.9925  
Fax: 604.688.3830  
Email: mshilleto@rbs.ca

#### Assistant

Maggie Moniatowicz  
Direct: 604.595.9901  
Fax: 604.688.3830  
mmoniatowicz@rbs.ca

Practice Manager  
Eduardo De Souza  
Direct: 604.909.9310  
Fax: 604.688.3830  
Email: edesouza@rbs.ca

#### Practice Areas

Business Reorganizations

Estate & Wealth Advisory

Estate and Trust Administration

Personal Planning: Wills, Powers  
of Attorney, and Health Care

Private Business and Family  
Enterprise Planning

Succession Planning for Privately  
Owned Businesses

Trusts



Wealth Preservation

#### Bar Admission

2019 - Alberta

2020 - British Columbia

#### Education

2018, J.D., University of Calgary

2015, Bachelor of Communications, Mount Royal University

#### Languages

English

Max was born and raised on Vancouver Island, and is thrilled to have returned to the West Coast after starting his legal career in Alberta. Away from the office, Max loves exploring the North Shore with his partner, Katrina, and their Bernedoodle, Mookie. On rainy days when he's forced to stay inside, Max enjoys watching movies, cheering on the Pacific Northwest sports teams, and listening to dusty old records.

#### PRESENTATIONS

- *"Electronic Wills & Remote Witnessing; Multiple Will Planning; Joint Assets & Beneficiary Designations"* - Presented to Large Financial Organization, October 12, 2022;
- *"What's Your Plan - Estate Planning Tips and Tricks for Professionals"* - Presented to North American Labor Union, October 2, 2022; and
- *"Beneficiary Designations; Life Insurance Planning; Tax-Optimized Estate Planning Strategies"* - Presented at Conference for National Insurance Organization, September 21, 2022.

#### COMMUNITY INVOLVEMENT

- Opening Gaits Therapeutic Riding Society, Board Member

#### PROFESSIONAL AFFILIATIONS

Member, Estate Planning Council of Vancouver

Member, Law Society of British Columbia

Member, Canadian Bar Association

Associate Member, Society of Trust and Estate Practitioners (STEP)

#### NEWS

October 3, 2023

Do You Have a Will? BC's "Make a Will Week" Campaign - Oct. 1 - 7, 2023

#### EVENTS

September 19, 2023

October 1-7, 2023 is Make a Will Week in BC - Learn More & Register for a Complimentary Webinar!

July 10, 2023

Register for a Complimentary Webinar on July 13, 11:30 am - 1:00 pm



June 28, 2023

Estate & Wealth Advisory Group Members Host Seminar on Family Shareholders' Agreements

## **PUBLICATIONS**

July 17, 2023

Shareholders' Agreement in a Family Operated Business



**VANCOUVER OFFICE:**  
700 - 401 W GEORGIA STREET  
VANCOUVER, BC CANADA V6B 5A1  
TEL: 604.682.3664 FAX: 604.688.3830

**SURREY OFFICE:**  
310 - 15117 101 AVENUE  
SURREY, BC CANADA V3R 8P7  
TEL: 604.582.7743 FAX: 604.582.7753

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