



**RICHARDS  
BUELL  
SUTTON<sup>LLP</sup>**  
*Established in 1871*



## MAX S.J. SHILLETO, 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

#### Contact Info

Practicing From  
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#### 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



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RBS.CA

Wealth Preservation

#### Bar Admission

Alberta, 2019

British Columbia, 2020

#### Education

University of Calgary, J.D., 2018

Bachelor of Communications,  
Mount Royal University, 2015

#### Languages

English

- Incorporation, share ownership, shareholders agreements, and management agreement

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

Estate Planning Council of Vancouver

Law Society of British Columbia

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

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## EVENTS

May 27, 2024

Honouring Recipients of the Courage to Come Back Awards

May 8, 2024

Register for our Complimentary Family Law Seminar

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

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