



Rosanne T. Rocchi

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RELATED SERVICES

Pensions, Benefits & Executive
Compensation

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Biography

Extensive experience with all areas of wealth transfers and management, including business succession planning and family shareholder dispute resolution. Rosanne has broad experience in many areas of tax, corporate and trust law with emphasis on fiduciary issues in both a commercial context and the charitable sector. She also has considerable experience with pension trusts and benefit trusts. Recently involved in restructuring of trusts and business vehicles for First Nations and Aboriginal communities.

Rosanne's creativity is evident in her ability to design unique products and innovative vehicles in the area of business trusts and private sector/public sector partnering arrangements. Her background as a Director of a national public financial institution has enhanced her ability to advise on investment management issues, including prudent investor issues.

A frequent speaker and author, she is contributing editor of Personal Tax and Estate Planning Journal (Federated Press) and past editor of Estates, Trusts and Pensions Journal (Canada Law Book, 1997 to 2005). Member of the Society of Trust and Estate Practitioners (STEP) and the Canadian Tax Foundation (CTF). LLB and LLM (taxation) from Osgoode Hall Law School.

Professional achievements & leadership

- *The Best Lawyers in Canada* – Trusts and Estates, 2006 – 2020
- *The Canadian Legal Lexpert® Directory*, Estate & Personal Tax Planning; Charities & Not-for-Profit Law, 2012 – 2019
- Martindale-Hubbell AV Preeminent® Rated Lawyer, 1988 – 2018
- Listed in "Women in the Lead" Ivey Women in Management Newsletter Directory; a national directory of Canadian women whose professional expertise and experience recommend them as candidates for corporate board appointment
- Who's Who Legal Canada: Private Client, 2015

Corporate directorships

- Board of Governors, Regis College, University of Toronto
- Director, RTIM Management Holdings Inc. (investment management subsidiary of Royal Bank of Canada), 1996 – 2000
- Governor, Canadian Tax Foundation, 1988-1991
- Alternate Governor, Toronto Maple Leafs Hockey Club, National Hockey League, 1989 – 1991
- Alternate Governor, Toronto Argonauts Football Club, Canadian Football League, 1991 – 1992

Professional memberships

- Society of Trust and Estate Practitioners (STEP)
- Canadian Bar Association
- Canadian Tax Foundation

Bar admissions & education

- Ontario Bar, 1978
- LL.M., (Taxation), Osgoode Hall Law School, York University, 1986

- LL.B., Osgoode Hall Law School, York University, 1976
- B.A., University of Toronto, 1973

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