



Stephanie Coleiro

Paraprofessional | Toronto

scoleiro@millerthomson.com

Biography

Stephanie Coleiro is a Law Clerk in the Private Client Services group of Miller Thomson's Toronto office. As an experienced Law Clerk and former Trust Officer, Stephanie's focus is on estate and trust administration, court passing of accounts and guardianship matters. Stephanie has extensive experience in the end-to-end administration of estates, including the preparation of Probate applications, identification and valuation assets, preparation of Estate Accounts, distributions to beneficiaries. Stephanie knows how important it is to listen to clients and provide clear communication throughout the process.

Stephanie's key area's of focus are:

Estate Administration: identifying and valuating assets, preparing Probate applications, dealing with financial and governmental institutions, preparation of Estate Trustee Accounts and distributions to beneficiaries.

Guardianships: meeting with clients to understand their needs, preparing Court approved Management Plans and Guardianship Plans.

Estate & Trust Accounting: correspondence with financial institutions to collect and value assets, understanding and reviewing financial statements and preparing formal and informal Accounts for distribution to beneficiaries and filing with the Court.

Stephanie worked as an Estate and Guardianship Law Clerk with a boutique firm for the past seven years. During this time she was able to work her way up to a Senior Law Clerk position, taking on more complex estate and trust administrations, guardianship matters and passing of accounts. As a Senior Law Clerk, she also participated in the mentorship and training of Junior Law Clerks.

Stephanie is also a former Trust Officer for a large financial institution which allowed her to personally work with clients to administer Estates and Trusts, as well as oversee and administer Guardianship matters, which

included input into the preparation of Management Plans and Guardianship Plans.

Education

- Certificate in Estate and Trust Administration from STEP Canada, which recognizes an individual as a specialist in estate and trust management
- Fanshawe College - Honours Law Clerk Diploma

Professional memberships

- Former member of STEP Canada