




“Relatable, explains things in a way clients can understand.”

Craig Ross

Partner

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 905.247.4891

 Email

Wills, Estates and Trusts Group Head Craig Ross specializes in complex and high conflict wills and estates, representing business owners, professionals, high-net-worth individuals, blended families, families with children with disabilities, and individuals and families dealing with discord.

In complex estate planning cases, he works closely with clients and other professional advisors to develop customized estate plans that give maximal effect to his clients' intentions. These could be identifying and dealing with responsibilities to spouses, common-law spouses, and other dependants; developing creative solutions to give effect to special intentions regarding certain beneficiaries or estate property; and making use of trusts and other tools to provide estate protection, creditor protection, and income tax and probate planning as circumstances require.

Craig is regularly called on to advise business owners on appropriate business structures and strategies to achieve their goals related to the succession of businesses and the death of business owners. He has significant expertise in the use of family trusts for business succession and other purposes.

Furthermore, Craig has significant experience assisting families with children who have disabilities. This includes educating parents on the planning required to protect ODSP benefits for their children and utilizing the legal tools to secure this protection, advocating on behalf of families when beneficiaries' ODSP benefits are at risk, and representing families where court-ordered guardianship is required to care for their loved ones. He is a director of Community Living Mississauga and sits on their Rights Review Committee.

In addition, Craig has a robust estate administration and litigation practice providing efficient, cost effective and expert advice to estate trustees in everyday probate and estate administration work.

Uniquely qualified to deal with more complex issues, he advises clients on succession of businesses, establishing and administering testamentary trusts, extra provincial and foreign jurisdictions, claims by and against estates and conflict resolution. Craig is regularly called on by his peers to act in a fiduciary capacity and has acted as court-appointed estate trustee and estate trustee during litigation.

His estate litigation practice includes representing estate trustees and beneficiaries in conflicts regarding accountings, removal of estate trustees, disposition or administration of assets, claims against beneficiaries, dependent support applications, will interpretations and other issues.

Finally, Craig has significant experience in matters of capacity and management of property and personal care. This includes many contested and uncontested guardianship applications, advising guardians and attorneys on management of property and personal care and court approval of attorney and guardian accounts. He is regularly asked to act as court appointed section 3 counsel for vulnerable individuals whose capacity is in issue.

2024
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Expertise

- Commercial Litigation
- Wills, Estates & Trusts
- Elder Law
- Estate Administration
- Estate Litigation
- Executors and Trustees
- Family Business Succession
- Family Trusts
- Guardianship and Capacity Law
- Powers of Attorney
- Trusts
- Trusts for Disabled Beneficiaries
- Wealth Management and Estate Planning
- Wills

Industries

- Healthcare

Education

B.A. (Hons.), University of Toronto (2002)
LL.B., Osgoode Hall Law School (2005)

Called to the Ontario Bar, 2006

Awards

- Fourteen Pallett Valo Lawyers Recognized by Best Lawyers®
- The 2024 Canadian Legal Lexpert Directory Recognizes Four Pallett Valo Lawyers
- Best Lawyers™ Accolades for Eleven Pallett Valo Lawyers
- The 2023 Canadian Legal Lexpert Directory Recognizes Four Pallett Valo Lawyers
- Seven Pallett Valo Lawyers Recognized by Best Lawyers™
- Best Lawyers in Canada Honours 2 Pallett Valo Lawyers
- Pallett Valo Lawyers Are Once Again Recognized in the 2022 Canadian Legal Lexpert Directory
- Six Pallett Valo Lawyers Are Recognized in the 2022 Edition of Best Lawyers™ and Best Lawyers: Ones to Watch™
- Three Pallett Valo Lawyers Are Once Again Recognized in the Annual Publishing Of the Canadian Legal Lexpert Directory
- Four Pallett Valo Lawyers Recognized by Best Lawyers®
- Three Pallett Valo Lawyers Recognized in the 2020 Canadian Legal Lexpert Directory
- Three Pallett Valo Lawyers Recognized by Best Lawyers®
- Four Pallett Valo Lawyers Recognized In The 2018 Canadian Legal Lexpert Directory
- Four Pallett Valo Lawyers Recognized in the 2019 Canadian Legal Lexpert Directory

Memberships

- Member, Canadian Bar Association
- Member, Ontario Bar Association
- Member, Peel Law Association
- Member, Estate Planning Council of Mississauga
- Member, Board of Directors for Community Living Mississauga

Publications

- The Slayer Rule: How Murder Impacts Estate Distribution September 2024
- The Lost Inheritance: A Cautionary Tale for Executors October 2023
- Eliminating or Reducing Probate Fees November 2018
- Can You Dispose of Corporate Assets by a Will? December 2019

Other Publications and Presentations

- Law Society of Ontario: Probate Essentials – Unusual Grants of Probate, 2010
- Law Society of Ontario: Probate Essentials – Issues Related to Security, 2011
- Law Society of Ontario: Probate Essentials – Winding Up an Estate Administration, 2012
- Law Society of Ontario: Probate Essentials – Potpourri of Issues, 2013
- Law Society of Ontario: Probate Essentials – International Issues, 2014

- Law Society of Ontario: Probate Essentials – Life Insurance – Designations and Insurance Trusts, 2015
- Law Society of Ontario: Probate Essentials – The Rectification of Wills in Ontario, 2016
- Law Society of Ontario: Probate Essentials – Five Mistakes Lawyers Make in Probate Matters, 2017
- Law Society of Ontario: Probate Essentials – Protecting Estates from Identity Theft, 2018
- Hamilton Law Association – Planning for Beneficiaries with Disabilities – Ramifications of the Qualified Disability Trust, February 2016
- Ontario Bar Association – Wills and Estate Planning: A Primer – Drafting Powers of Attorney for Property and Personal Care, September 2015
- Canadian Tax Foundation – Trends in Estate Planning, March 2015
- Hamilton Law Association – Planning for Beneficiaries with Disabilities – Henson Trusts and RDSPs, February 2013

Recognition

- Recognized as a Leading Practitioner in the area of Estate and Tax Planning by the Canadian Legal LEXPERT Directory
- Selected by peers for inclusion in *The Best Lawyers in Canada*™ annually since 2014 in the field of Trusts and Estates
- 2014 Volunteer MBC John Huether Award for Volunteering Excellence
- 2017 recipient of the Civic Award of Recognition from the City of Mississauga

77 City Centre Drive, West Tower, Suite 300, Mississauga, Ontario L5B 1M5 · 1.800.323.3781