

Craig Ross

Partner

Education

B.A. (Hons.), University of Toronto (2002)
LL.B., Osgoode Hall Law School (2005)
Called to the Ontario Bar, 2006



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Areas of Expertise: [Cross Border Services](#), [Estate Litigation](#), [Family Business Law](#), [Wills Estates & Trusts](#)

Practice

Craig Ross is the Head of the Will, Estates and Trusts Group, and a Member of the Estate Litigation and Family Business Law Group.

Craig's practice focuses on complex and high conflict wills and estates, representing business owners, professionals, high net worth individuals, mixed families, families with children with disabilities, and individuals and families dealing with discord.

He works closely with clients and other professional advisors on estate planning, with a focus on complex cases. He helps clients develop customized estate plans which give maximal effect to clients' intentions by: 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 structures and strategies for their businesses to achieve a number of 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.

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. Craig is a director of Community Living Mississauga and sits on their Rights Review Committee.

Craig has a robust estate administration and litigation practice. Craig's team provides efficient, cost effective and expert advice to estate trustees in everyday probate and estate administration work. Craig is also uniquely qualified to deal with more complex issues such as 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. Craig's 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. Craig is regularly asked to act as "Section 3" counsel - court appointed counsel for vulnerable individuals whose capacity is in issue.

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Special Designations and Awards

- 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 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

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

- Three Pallett Valo Lawyers Are Once Again Recognized in the Annual Publishing Of the Canadian Legal Lexpert Directory – April 2021
- Four Pallett Valo Lawyers Recognized by Best Lawyers® – August 2020
- Three Pallett Valo Lawyers Recognized in the 2020 Canadian Legal Lexpert Directory – April 2020
- Can You Dispose of Corporate Assets by a Will? – December 2019
- Three Pallett Valo Lawyers Recognized by Best Lawyers® – August 2019
- Four Pallett Valo Lawyers Recognized in the 2019 Canadian Legal Lexpert Directory – May 2019
- Four Pallett Valo Lawyers Recognized In The 2018 Canadian Legal Lexpert Directory – May 2018
- Estate dispute shows that leaving an unclear will can have serious legal and personal consequences for family members and estate trustees – February 2013
- Executors beware: Important changes to the administration of Ontario probate tax are coming – January 2012
- Special Needs Planning for Family Caregivers – November 2011
- Trust, Estate and Third Parties - Compliance Issues in Modern Practice – April 2011
- Probate Gems - Probate Essentials 2010 – January 2010
- Practice Gems - Probate Essentials 2009 – September 2009
- Priority for funeral expenses in bankruptcy: Re decleva – June 2009

- Successful Succession – March 2008
- Estate planning Updates - Recent cases – July 2007
- Some Estate Planning Opportunities (Revised December 2008) – December 2006

Videos

- The Changes to the Probate Fee Assessment Process in Ontario – April 2019
- Eliminating or Reducing Probate Fees – November 2018

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

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