



## Zachary Rogers

Associate

Estates & Trusts

Elder Law

Charities & Not-For-Profits

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### Profile

Zachary maintains both a litigation practice and a solicitor's practice, exclusively in the areas of Wills, Trusts & Estates, Elder Law, and Charities & Not-For-Profits.

Whether it is a client's first time going through the litigation process or the tenth, it can be an intimidating, confusing and emotionally draining experience. Zachary recognizes that his clients want practical, cost-effective advice and solutions tailored to their unique needs, and he is committed to finding creative and appropriate solutions to resolve legal disputes.

Never one to shy away from a challenging case, Zachary has successfully navigated the litigation process from start to finish for numerous clients. He has represented their interests in the Provincial Court of British Columbia, British Columbia Supreme Court, and the British Columbia Human Rights Tribunal. His competitive edge and ability to distill complex legal concepts into clear, step-by-step solutions give clients the confidence they need when dealing with stressful situations.

Zachary's analytical mindset allows him to effectively evaluate large amounts of data and handle all aspects of the litigation process. This includes case management and client reporting, pleadings, document production and analysis, examinations for discovery, expert engagement, chambers applications, settlement negotiations, mediations, and, when necessary, trial.

## Estate & Trust Litigation Services &nbsp;&nbsp;

- > Wills variation claims (to address disinheritance and unfair distributions)
- > Contested and uncontested committee applications
- > Undue influence and incapacity claims
- > Unjust enrichment claims
- > Abuse of powers of attorney claims
- > Breach of trust claims
- > Executor and trustee compensation
- > Construction of wills applications
- > Passing of executor and trustee accounts

Zachary also assists clients in preparing estate and incapacity plans, and in the administration of estates of &nbsp;&nbsp;&nbsp;deceased individuals. His estate planning clients range from young professionals looking to establish their first foundational estate plan, to retired individuals looking to ensure that their estate plans are probate fee minimizing, tax efficient, and litigation resistant.. His estate administration clients range from first-time executors, to professional fiduciaries and trust companies. In all cases, he is able to simplify complex legal principles to ensure that the decisions his clients make are well-informed ones.

## Estate Planning & Administration Services&nbsp;&nbsp;

- > Estate planning advice and drafting of wills and trusts
- > Lifetime planning advice and drafting of powers of attorney, representation agreements, nominations of committee, and advance directives
- > Estate and trust administration services including probate and non-probate solutions
- > Advising executors and trustees regarding their duties and obligations
- > Advising executors, trustees, and beneficiaries regarding the passing of accounts, and remuneration
- > Dealing with foreign grants of probate including resealing, and the administration of local assets

Zachary is motivated by the opportunity to impact the lives of his clients, colleagues and community members through his law practice.

Zachary is a member of Clark Wilson's Student Recruiting Committee.

## Credentials

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### Awards & Distinctions

- > Society of Trust and Estate Practitioners (STEP) Private Client Awards finalist for Contentious Trusts and Estates Team of the Year 2021

### Education & Call to Bar

- > Call to Bar: British Columbia, 2015
- > Juris Doctor, University of New Brunswick, 2013
- > Law Student Exchange Program to &Ouml;l;rebro University, Sweden, 2012-2013

- > Bachelor of Business Administration, Concentration: Management Information Systems, Simon Fraser University, 2010

### **Industry & Community Involvement**

- > Vancouver Bar Association, Secretary / Treasurer, 2020-Present
- > Trial Lawyers Association of BC, Board of Governors, 2020-Present
- > Access Pro Bono Wills Clinic Project, Volunteer, 2019-Present
- > Young Estate Practitioners, Steering Committee Member, 2019-Present
- > The Advocates' Society, The Young Advocates' Standing Committee (Vancouver) Member, 2019-Present
- > Start Proud, Vancouver Regional Team, Director of Professional Engagement, 2019-Present
- > Vancouver Bar Association, Member-at-Large (Elected), 2017-2019

### **Mentorship**

- > Moot Court Judge, UBC Law School 1L moot, 2020
- > CBABC Student Mentorship Program, Mentor, September 2015-Present
- > First Generation Network National Mentorship Program, University of Victoria Chapter, Mentor, 2018-2019

### **Membership & Associations**

- > Society of Trust and Estate Practitioners (STEP), Student Member
- > Trial Lawyers Association of British Columbia (Estate Litigation), Member
- > The Advocates' Society, Member
- > Vancouver Bar Association, Member
- > Law Society of British Columbia, Member
- > Canadian Bar Association, Member (Wills and Trusts; Charities and Not for Profit Law; Elder Law; Civil Litigation)

### **External Publications**

- > Contributing author (Chapter 4 Rectification of a will), British Columbia Estate Litigation, published by LexisNexis, 2020
- > "There is no Will - What Happens if my Minor Children Survive Me", Leave a Legacy October 8, 2020
- > "The Benefits of including a charitable gift in your Will", Leave a Legacy April 27, 2020
- > Presenter, The Difficulties with Disinheritance, presentation to private wealth professionals February 2020
- > Case Comment: Camusky v Calmusky, presentation to the members of the CBA BC Wills & Trusts Vancouver subsection, October 20, 2020
- > "Contesting a Will in British Columbia" People's Law School Webinar, Make-A-Will Week 2020, October 27, 2020