SANDRA ABLEY

Sandra is Associate Counsel with Harper Grey practising with our Wills & Estates and Business Law Groups. Her practice is focused on wealth management and preservation.

SANDRA ABLEY
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ASSISTANT

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EXPERTISE

Wills & Estates
Business Law

Sandy's deep and abiding care for her clients and their families informs everything that she does in her practice.

Her legal background and wealth planning experience with large financial institutions have equipped her to provide comprehensive and integrated wealth planning recommendations and guidance to her clients. Sandy is a designated member of the *Society of Trust and Estate Practitioners*, and is recognized by her peers and industry as a senior practitioner in this field.

Sandy honed her expertise as a tax lawyer in downtown Vancouver where she specialized in tax and estate planning. Most recently as the former Vice-President & Regional Director of Planning for a nationally recognised financial institution, Sandy provided overall leadership and strategic direction to advanced planning experts.

Working from the belief that best results often come from taking a collaborative approach, Sandy frequently teams with other service providers such as accountants, financial institution professionals, and family lawyers to ensure optimum outcomes.

Sandy has a particular gift for translating complicated legal concepts into every day language. As a refugee from Vietnam her childhood in Canada was spent helping her parents and their friends understand the financial, legal, and cultural aspects of their new country.

Our firm has the ability to interpret for a number of different languages, including Cantonese and Mandarin, with respect to wills, trusts, powers of attorney and other estate planning documents. We are also able to review and unofficially translate Chinese documents including business contracts and related materials.

EXPERIENCE

ESTATE PLANNING

- Estate planning advice regarding wills, powers of attorney instruments, representation agreements for health care, trusts, and corporate reorganizations.
- Inter-generational family wealth planning
- Design and implementation of plans for income splitting and creditor protection.
- Design of customised plans to minimize or avoid taxes on death, to reduce probate fees or avoid the need to apply for probate, and to protect the estate against litigation.

- Incapacity planning and committee applications –helping families with advanced planning to protect against a parent or other loved one who loses their capacity to run their personal and business affairs. Seniors can be vulnerable to financial abuse so getting protections into place as soon as possible is vital.

ESTATE ADMINISTRATION

- Estate administration including probate and other administration applications.

BUSINESS SUCCESSION

- Helping clients with family-owned or owner-run business succession planning including managing the challenges of multi-family issues, advising on complex corporate and trust structures, and managing family expectations.
- Developing and implementing plans for cash flow management.
- Establishing secure “family bank” structures.
- Financially educating the next generation to help preserve and grow the family wealth and business.

CREDENTIALS

EDUCATION

- UBC Sauder School of Business, Executive Education, UBC Business Families Centre, 2015
- Financial Planning Standards Council, CFP, 2013
- CPA Canada In-Depth Tax Course, 2005–2007
- University of British Columbia, JD, 2004
- Canadian Securities Institute, Canadian Securities Course (Honours), 2002
- Simon Fraser University, BBA, 1996

BAR ADMISSION

- British Columbia, 2005

LEADERSHIP

- Vice-Chair, CBA Wills & Trusts Subsection, 2017-2018
- Author, Estate Planning and Wealth Preservation Update
- Treasurer, Wills and Trusts Section, Canadian Bar Association – British Columbia Branch, 2016-2017
- Legislative Liaison, Wills and Trusts Subsection, Canadian Bar Association – British Columbia Branch, 2015-2016
- Secretary, Wills and Trusts Subsection, Canadian Bar Association – BC Branch, 2014-2015
- Past Chair, CBA Wills & Trusts Subsection, 2013-2020
- Past President, Association of Women in Finance, 2013-2014
- Past Vice-President, Association of Women in Finance, 2012-2013
- Past Events Co-Chair, Association of Women in Finance, 2011-2012

MEMBERSHIPS

- Member, Estate Planning Council of Vancouver
- Member, Canadian Bar Association, BC Branch
- Member, Canadian Tax Foundation
- Society of Trust & Estate Practitioners (STEP)

RECOGNITION

Recognized as a "Leading Lawyer" in the area of Trusts and Estates by Best Lawyers® in Canada, 2020

SELECT ARTICLES + PUBLICATIONS

Sandra Abley authors “No Such Thing as a Dead Simple Will” article
Written by: Sandra Abley, JD, CFP®, TEP

Article co-authored by Sandra Abley and Mollie Clark published by CBA National Wills, Estates and Trusts section
CBA National Wills, Estates and Trusts
Written by: Sandra Abley, JD, CFP®, TEP

SELECT EVENTS + PRESENTATIONS

Sandra Abley, Erin Hatch and Roselle Wu to attend 2019 CBABC Wills and Trusts Conference
Event date: 20.Sept.19
Presented by: Sandra Abley, JD, CFP®, TEP, Erin Hatch, Roselle P. Wu

Sandra Abley presents “Estate Planning Tips and Traps”
Presentation date: 05.Sept.19
Presented by: Sandra Abley, JD, CFP®, TEP

Michael Drouillard and Sandra Abley to attend 2018 Manufactured Home Park Owners Alliance of British Columbia AGM
Presentation date: 21.Sept.18
Presented by: Michael Drouillard, Sandra Abley, JD, CFP®, TEP

Michael Drouillard and Sandra Abley to present at the 2017 Manufactured Home Park Owners of British Columbia AGM
Presentation Date: 23.Sep.17
Presented by: Sandra Abley, JD, CFP®, TEP, Michael Drouillard

SELECT NEWS

Harper Grey receives 48 rankings from Best Lawyers® in Canada 2020
Related to: Sandra Abley, JD, CFP®, TEP, Steven Abramson*, Owais Ahmed, Bryan G. Baynham, QC, Richard E. Bereti*, Salman Y. Bhura*, Guy P. Brown, QC*, William S. Clark*, Prentice Durbin*, Michael J. Hewitt*, Kimberly J. Jakeman*, Steven G. Lukas*, Maureen L.A. Lundell, QC, William D. MacRae*, Derek Mah*, Jonathan D. Meadows*, David W. Pilley, Una Radoja*, Christopher M. Rusnak*, Raj Samtani*, John P. Sullivan*, W. Sean Taylor, Michael G. Thomas*, Nigel L. Trevethan*, Abigail C.F. Turner*, Henning W. Wiebach*, Jennifer R. Woznesensky, Lara C. Zee - 21.Aug.19

Sandra Abley invited by BC Minister of Health to make a presentation at Annual Journey to Freedom Day Act celebration
Related to: Sandra Abley, JD, CFP®, TEP - 25.Apr.19

Sandra Abley elected as Chair of the CBA Wills & Estates Subsection
Related to: Sandra Abley, JD, CFP®, TEP - 05.Sep.18

Sandra Abley and Erin Hatch to be interviewed on Fairchild Radio
Related to: Sandra Abley, JD, CFP®, TEP, Erin Hatch - 30.Aug.18

Sandy Abley and Bill MacRae Support Make A Will Week
Related to: Sandra Abley, JD, CFP®, TEP, William D. MacRae* - 27.Mar.18

Sandra Abley quoted in Advisor.ca article
Published by: Advisor.ca - 14.Nov.17
Related to: Sandra Abley, JD, CFP®, TEP - 17.Nov.17

Michael Drouillard and Sandra Abley to present at the 2017 Manufactured Home Park Owners Alliance of British Columbia AGM
Related to: Michael Drouillard, Sandra Abley, JD, CFP®, TEP - 18.Sep.17

Sandra Abley appointed Vice-Chair of the CBA Wills & Trusts Subsection
Related to: Sandra Abley, JD, CFP®, TEP - 24.Jul.17

Harper Grey welcomes Sandra Abley, JD, CFP ®, TEP as Associate Counsel
Related to: Sandra Abley, JD, CFP®, TEP - 21.Apr.17

SELECT NEWSLETTERS + UPDATES

The Powers That Be: How to Use Your Power of Attorney
Published in: Estate Planning and Wealth Preservation Update: 04.Sept.19
Written by: Sandra Abley, JD, CFP®, TEP

In Trust Accounts: the Good, the Bad and the Ugly
Published In: Estate Planning And Wealth Preservation Update
Written by: Sandra Abley, JD, CFP®, TEP

Enduring Power of Attorney Agreements
Published in: Estate Planning and Wealth Preservation Update: 25.Sept.18
Written by: Sandra Abley, JD, CFP®, TEP

Being an Executor of a Will
Published in: Estate Planning and Wealth Preservation Update - 17.Jul.18
Written by: Sandra Abley, JD, CFP®, TEP

Estate Litigation Primer: Wills Variation Overview
Published in: Estate Planning and Wealth Preservation update Update - 01.May.18
Written by: Sandra Abley, JD, CFP®, TEP, Erin Hatch

Planning for Medical Assistance in Dying
Published in: Estate Planning and Wealth Preservation Update - 08.Mar.17
Written by: Sandra Abley, JD, CFP®, TEP, Dionne H. Liu

Do Not Delay, Sometimes It Can Be Too Late
Published in: Estate Planning and Wealth Preservation Update - 25.Jan.18
Written by: Sandra Abley, JD, CFP®, TEP

The Financial Abuse of Seniors
Published In: Estate Planning & Wealth Preservation Update - 09.Nov.17
Written by: Sandra Abley, JD, CFP®, TEP, Roselle P. Wu

Protecting Gifts to Adult Children
Published in: Estate Planning & Wealth Preservation Update - 19. Sep.17
Written by: Sandra Abley, JD, CFP®, TEP, Maureen L.A. Lundell, QC

What Are Probate Fees & Should You Try To Avoid Them?
Published in: Estate Planning and Wealth Preservation Update - 05.Jul.17
Written by: Sandra Abley, JD, CFP®, TEP

Executor held Financially Responsible for the Mismanagement of an Estate
Published in: Estate Planning and Wealth Preservation Update - 01.May.17
Written by: Sandra Abley, JD, CFP®, TEP