



## Roy Boettger, KC, TEP, Counsel

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### Overview

Roy Boettger, KC is a Calgary-based lawyer and senior figure in Field Law's Wills, Estates and Trusts practice group. Roy's clients are typically based in Calgary and the surrounding area, but he also has experience providing counsel to clients located in other Canadian provinces and territories who have personal financial interests based in Alberta. Roy's practice serves families and individuals in the development and updating of their estate planning arrangements, or to resolve issues which may have arisen from an existing estate planning or estate administration experience.

Bringing 50 years of experience to clients of the firm, Roy is called on by families and individuals to assist in making the critical plans necessary to preserve and protect their financial security and ensure an effective transfer of wealth while mitigating against potential planning concerns such as ability challenged or spendthrift beneficiaries, matrimonial disruption, second family relationships, estate or trust litigation and other succession and estate planning issues. As asset protection considerations remain at the forefront of many client's concerns, Roy remains attentive to potential provincial and federal legislation changes which could impact families and their own individual wealth-transfer processes. Roy was appointed a Queen's Counsel in 1992, becoming a King's Counsel upon the passing of Her Majesty in September 2022.

As a well-respected practitioner in the area of wills, trusts and estates, Roy has cultivated productive, positive relationships with his peers on both sides of the negotiating table – ultimately adding value for the firm's clients through his ability to maintain amicable relations throughout a dispute resolution process. Because Roy understands that no two families are the same and that personal situations and intentions vary widely, he regularly provides clients with a variety of potential solutions for their issue.

Clients come to Roy for complex, estate and trust-related issues such as:

- Estate planning, including complex planning for high net worth families and individuals
- Estate litigation
- Dispute resolution
- Estate administration
- All matters relating to trusts
- Asset protection strategy development

Roy's extensive community involvement reflects his dedication to continuously enriching his community. Through relationship building and a sustained

### Services

Estate Administration  
Estate + Trust Disputes  
Wills + Estate Planning  
Wills, Estates + Trusts  
Trusts  
Cross-Border Services

### Education

University of Alberta, 1973,  
Bachelor of Laws  
University of Calgary, 1970,  
Bachelor of Arts

### Admissions

Alberta, 1974

commitment, he uses his experience in service of others. Roy's community involvement has extended to Board postings on a number of prominent charitable and community-focused organizations in the city, including The Calgary Foundation - where he served as a Director for 9 years, including 2 years as Chairman, the Alberta Children's Hospital Foundation - where he served as a Director for 11 years, the Calgary Rotary Clubs Foundation - where he served as a Director for 6 years, and also served as Chairman, and The Rotary Club of Calgary-Downtown - where he served as a Director and as President. Roy currently serves as a Director and Vice-President of the McMahon Stadium Society. Roy has also spent many years as an instructor for the Alberta Bar Admissions Course and lecturer for the Legal Education Society of Alberta and Canadian Bar Association in the area of Wills, Estates and Trusts.

### Value to Clients

*"Through active listening and investigation, I attempt to provide clients with legal advice which doesn't get caught up in process at the expense of what matters most: results. I know that when clients bring an issue to me it is of critical importance to them, and I counsel them accordingly. By focusing on results and solutions at the outset of an engagement, I work to respect our client's time and interests, and avoid unnecessary costs and litigation risk in the future."*

### Outside the Office

Outside of his legal career, Roy spends leisure time with his wife, daughters and grandchildren. Whenever possible, he likes to travel, hike, and play golf.

## Experience

Birkenbach Estate (Re), 2018 ABQB 538

Anderson Estate, 2017 ABQB 422

Quaintance Estate (Re), [2005] A.J. No. 162, Alberta Court of Queen's Bench

Royal Trust Corp. of Canada v. A.S.(W.)S. [A.S.W.S.], [2004] A.J. No. 421, Alberta Court of Queen's Bench

Clark (Re), [2003] A.J. No. 576, Alberta Court of Queen's Bench

Weidenberger Estate (Re), [2002] A.J. No. 1157, Alberta Court of Queen's Bench

Benefield v. Alberta (Public Trustee), 2001 ABQB 242

Jensen Estate (Re), [2001] A.J. No. 174, Alberta Court of Queen's Bench

Sykes v. Herron, [2000] A.J. No. 742, Alberta Surrogate Court

Sulpetro Ltd. Retirement Plan Fund v. Sulpetro Ltd. (Receiver of), [1989] A.J. No. 176, Alberta Court of Queen's Bench

## Recognition

Leading Practitioner: Estate + Personal Tax (Estate + Tax Planning), Canadian Legal Lexpert® Directory: 2024

Listed Trusts and Estates, The Best Lawyers™ in Canada: 2006 - 2024

"Consistently Recommended" Estate & Personal Tax Planning, Estate & Tax Planning, Canadian Legal Lexpert® Directory: 2018 - 2023

"Repeatedly Recommended" Estate & Personal Tax Planning, Estate & Tax Planning, Canadian Legal Lexpert® Directory: 1999 - 2019

AV Preeminent®, Martindale-Hubbell® Peer Review Ratings™: 1990 - 2022

Trusts and Estates "Lawyer of the Year" in Calgary, The Best Lawyers™ in Canada: 2009, 2014

Queen's Counsel: 1992

## Professional

### Law Society of Alberta

**Member**

1973 - Present

### Calgary Bar Association

**Member**

1973 - Present

**Canadian Bar Association, Wills and Trusts Section (Southern Alberta)****Member**

1973 - Present

**Executive Committee**

1975 - 1979

**Chairman**

1978 - 1979

**Calgary Estate Planning Council****Member**

1975 - 2012

**Executive Committee**

1982 - 1989

**President**

1987 - 1988

**Canadian Bar Association, Wills and Trusts Section (National)****Executive Committee**

1979 - 1986

**Chairman**

1984 - 1986

**American College of Trust and Estate Counsel****Fellow**

1995 - Present

**Society of Trust and Estate Practitioners (STEP), Calgary Branch****Founding Co-Chairman**

1999

**Member**

1999 - Present

**Community****Rockyview General Hospital Bio-Ethics Committee****Member**

1987 - 1999

**The Rotary Club of Calgary - Downtown****Member**

1988 - Present

**Director**

1991 - 1993

**President**

2008 - 2009

**The Calgary Foundation****Development Committee**

1996 - 2001

**Director**

1998 - 2007

**Chairman**

2002 - 2004

**Calgary Rotary Clubs Foundation****Director**

2011 - 2016

**Chairman**

2014 - 2015

**Alberta Children's Hospital Foundation**

**Director**

2009 - 2020

**McMahon Stadium Society**

**Director and Vice President**

2012 - Present

**News + Views + Events**

September 2018

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