

## CAROLINE RHÉAUME



### At a glance

**Caroline Rhéaume** is a tax lawyer with a master's degree in tax and Trust and Estate Practitioner (TEP). She founded her own firm in 2011 and specializes in Canadian and international tax and estate planning, the use of trusts, asset protection, family mission statements, and how to structure a family office. She provides tax consulting services to high-net-worth individuals and families, business owners, professionals, and athletes, and oversees the coordination and administration of these services across Canada, and the United States. Caroline gained her international experience working with multinational clients of all sizes (including while working at Ernst & Young, and KPMG).

Ms. Rhéaume is the author of the best seller *Utilisation des fiducies en planification fiscale et financière*, *Stratégies de planification utilisant des fiducies*, *Stratégies de transmission du patrimoine*, and *Strategic Use of Trusts in Tax and Estate Planning*, four books published by Wolters Kluwer.

She is also the author of the first and second French editions of the diploma program leading to the TEP designation awarded by the Society of Trust and Estate Practitioners (STEP) Canada, as well as the Certificate in Estate and Trust Administration, also offered by STEP Canada.

In addition to implementing strategies proposed in her books, Ms. Rhéaume frequently gives lectures and regularly writes tax articles for Wolters Kluwer, l'Association de planification financière et fiscale (APFF), and STEP. Some of the topics covered include Canada-U.S. estate tax planning, Succession planning involving foreign heirs, Immigrating to Canada with a U.S. trust, Estate planning for American clients with Canadian assets, The financial reality of professional athletes, and Why affluent athletes should embrace the wellness family office model.

She is also the first professional from the province of Quebec to have completed the Seven Stages of Money Maturity program offered by the Kinder Institute that trains and coaches financial advisors and professionals worldwide.