Biography For Rachel L. Blumenfeld

Rachel Blumenfeld is a Partner at Miller Thomson LLP. Her practice focuses in the areas of trusts and estates, tax law, and charities and not-for-profit law. She advises clients on tax and estate planning and estate administration, preparation of wills, trusts, and power of attorney documents, tax matters related to planned giving as well as business succession planning. She also offers advice to charities and trustees on the administration of estates and trusts.

Rachel's prior experience at a large life insurance company has given her a thorough understanding of her clients' needs and she is able to offer quick and practical solutions when working with insurance and financial advisors and their clients on estate, retirement and tax planning matters.

Within the charitable and not-for-profit sector, Rachel reviews planned giving programs, assists donors in tax-related matters and charities with the administration of bequests and other gifts, interprets new legislation and has developed several privacy compliance programs. She is keenly aware of the unique challenges faced by organizations and groups within this sector and is able to assist in a broad range of areas.

Rachel is a regular contributor of articles to newsletters and other publications and participates in seminars on current legal issues within her areas of practice. She has delivered workshops to insurance and financial advisors, fundraising professionals, and fellow lawyers on topics involving retirement and estate planning, life-insured buy-sell agreements, business succession planning and planned giving. Within the charitable sector, Rachel frequently delivers seminars on planned giving, bequest administration, privacy compliance and tax matters.

Rachel is committed to her community and is involved with several organizations including Reena, the Reena Foundation (an organization that serves developmentally disabled adults) and the Canadian Association of Gift Planners.

Education

University of British Columbia (LL.B., 1996)
Hebrew University, Jerusalem (M.A., International Relations, 1988)
University of Toronto (B.A., International Relations, 1983)
Called to Ontario Bar, 1998

Affiliations

Member, Canadian Bar Association, Ontario Bar Association - Trusts and Estates subsection, Tax subsection, Charities subsection
Member, Toronto Executive Member, Society of Trust and Estate Practitioners
Member, Canadian Tax Foundation
Member, Conference of Advanced Life Underwriters
Director, York Region Community Foundation
Past Director, Reena Foundation
Co-Chair, Programming Professional Advisory Committee, Jewish Foundation of Greater Toronto
Member, Programming Committee, Canadian Association of Gift Planners, Toronto Roundtable
Director, Netivot HaTorah School

Additional information

Completed CICA In-Depth Tax Course (2002)
Trust and Estate Practitioner