DAVIES



Rhonda Rudick

Partner

Office

Montréal

Tel

514.841.6525

Email

rrudick@dwpv.com

Expertise

Tax
Private Client
Family Office

Bar Admissions

Québec, 1997

Rhonda counsels clients on corporate and personal tax planning, both Canadian and cross-border, with a strong emphasis on estate planning.

Rhonda has extensive experience working with high-net-worth individuals, for whom she provides strategic, personalized estate and tax-planning advice with significant expertise in cross-border tax matters. She also counsels both Canadian and international clients on the tax aspects of corporate reorganizations and real estate transactions, with a strong emphasis on estate planning. Her clients include individuals, family offices, registered charities, non-profit organizations, real estate owners and private companies.

A frequent writer and speaker, Rhonda was a member of the inaugural STEP Canada/STEP USA Conference Planning Committee. She is an international fellow of The American College of Trust and Estate Counsel and a member of the International Academy of Estate and Trust Law. Rhonda is a co-author of*The Canadian Taxation of Trusts* (2nd edition). She is also a member of the firm's Talent Management and Recruiting committees.

Representative Work

Permanent Capital Partners Inc.

Acted for **Permanent Capital Partners Inc.** with CDPQ's minority investment in AVENIR GLOBAL, a Montréal-based holding managing public relations and communications firm that ranks in the international top 25.

Recochem

Acted as counsel to **Recochem** management in the acquisition of H.I.G portfolio company Recochem by funds managed by CapVest.

Psycho Bunny Inc.

Acted for **Psycho Bunny Inc.**, an affiliate of Thread Collective Inc., in connection with a transaction whereby Thread Collective Inc. transferred to Psycho Bunny Inc. all of its assets relating to its Psycho Bunny business and the subsequent investment by The BB Family International Trust in Psycho Bunny Inc.

A real estate company

Acted for **a real estate company** arbitrating the fair market value of properties in and adjustments applicable to a $500-million real estate portfolio being divided with a former partner.

Minority shareholders of Recochem Inc.

Provided tax and corporate advice to Canadian and U.S. minority shareholders as well as option holders of **Recochem Holdings, Inc**., a Delaware corporation, regarding a restructuring of the group in connection with its acquisition of Adam's Polishes, LLC based in Colorado.

Recochem, Inc.

Acted for management of **Recochem, Inc.**, a global leader in manufacturing, marketing and distributing aftermarket transportation and household fluids, in the acquisition of Recochem by an affiliate of H.I.G. Capital, a private equity investment firm from an affiliate of Swander Pace Capital.

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Kimco Realty Corporation

Acted for **Kimco Realty Corporation** in connection with the sale by its affiliates of co-ownership interests and partnership interests in a portfolio of 18 shopping centres located in Alberta and British Columbia to Anthem Properties Group Ltd. for $413 million dollars.

Kimco Realty Corporation

Acted for **Kimco Realty Corporation** in connection with the sale of its interests in 22 shopping centres to RioCan Real Estate Investment Trust for a purchase price of $715 million.

Kimco Realty Corporation

Acted for **Kimco Realty Corp.** in connection with the sale of its 50% interest in Tillicum, a 468,533-square foot shopping centre located in Victoria, British Columbia, to RioCan REIT at a net purchase price of $58.9 million along with a possible future consideration to Kimco based on additional potential residential density.

Kimco Realty Corporation

Acted for **Kimco Realty Corp.** in connection with the sale of its 50% interest in Tillicum, a 468,533-square foot shopping centre located in Victoria, British Columbia, to RioCan REIT at a net purchase price of $58.9 million along with a possible future consideration to Kimco based on additional potential residential density.

Kimco Realty Corporation

Acted for **Kimco Realty Corporation** and certain of its wholly owned subsidiaries in connection with Kimco's sale of its interest in Brentwood Village in Calgary, Alberta and Grand Park in Mississauga, Ontario to RioCan Real Estate Investment Trust for an aggregate purchase price of $87.5 million, and Kimco's acquisition of RioCan's interest in Montgomery Plaza in Fort Worth, Texas for a purchase price of US$58.3 million.

Renewable Energy Systems Canada Inc.

Acted for **Renewable Energy Systems Canada Inc.** (RES) in connection with a financing arrangement with Pattern Energy. This transaction involved arrangements between RES and Pattern Energy concerning six wind farm development bids being made in response to an RFP by Hydro-Québec.

Joddes Limited and members of the Goodman family

Acted for **Joddes Limited** and members of the Goodman family, the largest shareholders of Paladin Labs Inc., in connection with the acquisition of Paladin Labs Inc. by Endo Health Solutions Inc. in a stock and cash transaction valued at approximately $3 billion.

Kimco Realty Corporation

Acted for **Kimco North Trust III**, an indirect wholly-owned entity of Kimco Realty Corporation, in connection with its offering of $200 million unsecured notes on a private placement basis in Canada.

The Greenberg family

Acted for certain members of the **Greenberg family**, controlling shareholder of Astral Media Inc., in connection with the $3.38-billion acquisition of Astral Media by BCE Inc.

Kimco Realty Corporation

Acted for **Kimco Realty Corporation**, as part of separate joint ventures, in its

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acquisition of interests in three Canadian shopping centres comprising 377,000 square feet for USD $113.6 million, including $47.9 million of mortgage debt.

CSX Transportation, Inc.

Acted for **CSX Transportation, Inc.,** one of the largest railway companies in North America, in connection with its development of an intermodal terminal and other infrastructure projects in the Province of Québec.

Faubourg Boisbriand Shopping Centre Holdings Inc.

Acted for **Faubourg Boisbriand Shopping Centre Holdings Inc.** (a partnership among Kimco Realty Corporation, Sun Life Assurance Company of Canada and Sterling (Canada) Inc./North American (Boisbriand) Corporation) in its $92.6 million refinancing of the Faubourg Boisbriand lifestyle retail complex.

Renewable Energy Systems Canada Inc.

Acted for **Renewable Energy Systems Canada Inc.** in connection with its sale of interests in seven wind farm projects in the province of Québec totalling 1003.2 MW.

Kimco North Trust III

Acted for **Kimco North Trust III**, an entity controlled by Kimco Realty Corp., a leading U.S.-based REIT, in connection with private placement offerings of $150 million principal amount.

Renewable Energy Systems Canada Inc.

Acted for **Renewable Energy Systems Canada Inc. (RES)**, part of the St-Laurent Énergies consortium, consisting of EDF Énergies Nouvelles, Hydromega Services Inc. and RES, which was awarded five wind farm projects by Hydro-Québec Distribution representing a total capacity of 954 MW. These five projects represent a total anticipated investment in excess of $2 billion.

GMAC LLC

Acted for **GMAC LLC** as it completed US$38.146 billion outstanding notes exchange and purchase offers and separate offers to exchange and purchase outstanding notes of Residential Capital, LLC.

Kimco Realty Corporation

Acted for **Kimco Realty Corporation** which, together with RioCan REIT, consummated the transfer of air rights and residential density with respect to a 3.6 acre parcel of land forming part of the Brentwood Village Shopping Centre in Calgary.

Bank of Montreal, Canadian Imperial Bank of Commerce and JPMorgan Chase Bank

Acted for **Bank of Montreal**, **Canadian Imperial Bank of Commerce** and **JPMorgan Chase Bank** and a syndicate of nine banks in connection with an amended and restated US$800-million revolving credit facility agreement with Gildan Activewear Inc.

Kimco Realty Corporation

Acted for **Kimco Realty Corporation** in connection with Kimco Realty and Riocan Real Estate Investment Trust's acquisition of a 10-property shopping centre portfolio located in central and eastern Canada for $156 million.

Faubourg Boisbriand Shopping Centre Holdings Inc. (Kimco Realty Corporation)

Acted for **Faubourg Boisbriand Shopping Centre Holdings Inc.** (a joint venture

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among Kimco Realty Corporation, Cherokee Partners and Sterling Centrecorp) in connection with a $165 million construction credit facility in respect of the Faubourg Boisbriand lifestyle retail complex in Boisbriand, Québec.

Key Principal Partners Corp.
Acted for **Key Principal Partners Corp**. and its affiliates Plastival Canadian Holdings Inc. and Plastival US Holdings Inc. in the Canadian aspects of the funding of their approximately $52.5 million purchase of Plastival Inc. (Canada) and Plastival, Inc. (US).

Kimco Realty Corporation
Acted for **Kimco Realty Corporation** in the establishment of a partnership with Sterling Centrecorp and Cherokee Partners and the subsequent acquisition by the partnership of Faubourg Boisbriand, a lifestyle-based 1.2 million square foot power centre currently being developed in Boisbriand, Québec.

The Claridge/Andell Group
Acted for **Claridge/Andell Group** which, with Capital Communications CDPQ Inc. and Mosaic Media Group, acquired dick clark productions Inc. in a transaction valued at approximately US$140 million.

John Hancock Life Insurance Company
Acted for **John Hancock Life Insurance Company** in regard to its purchase of US$44.5 million of senior secured notes of Gaspesia Papers, L.P.

The Hockey Company and Sport Maska Inc.
Acted for **The Hockey Company** and **Sport Maska Inc**. in regard to the offering of US$125 million of senior secured note units using a cross-border dual note financing structure.

Amot Investments Ltd.
Acted for **Amot Investments Ltd.** in the acquisition of a 50% interest in Phase 1 of E-Commerce Place, Montréal, Québec.

BCE Inc.
Acted for **BCE Inc.** in regard to the privatization of Teleglobe by BCE Inc.

Recognitions

American College of Trust and Estate Counsel
International Fellow

Chambers High Net Worth Guide
Private Wealth Law: Canada
Band 1

Chambers Canada
Charities/Non-profits

Lexpert Special Edition
Finance; Restructuring and Insolvency

Lexpert (CLLD)
Estate and Personal Tax Planning: Estate and Tax Planning
Most Frequently Recommended

Lexpert (CLLD)

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Charities/Not-For-Profit Law; Corporate Tax

Best Lawyers Canada
Charities/Non-Profit Law; Tax Law; Trusts and Estates Law

Best Lawyers Canada
Charities/Non-Profit Law
Lawyer of the Year 2026, Montréal

Best Lawyers Canada
Trusts and Estates Law
Lawyer of the Year 2017 and 2021, Montréal

External Engagements

Speaking Engagement
American College of Trust and Estate Counsel, International Estate Planning Committee, "Planning for Canadians with U.S. Investments and U.S. Children"; Tampa, FL
Mar 6, 2026

Article
Canadian Taxation of Trusts, **2nd Edition, co-author**
May 5, 2025
Canadian Tax Foundation

Speaking Engagement
Canadian Tax Foundation, Canadian Taxation of Trusts Conference, "Estate Admin – Technical Tax and Estate Admin Law Issues"; Toronto, ON
May 5, 2025

In the News
Interview, *Canadian Family Offices*, **"Equalizing heirs in the will is a delicate dance for business families"; Online**
Jan 14, 2025
Read More

Article
Selected US Tax Developments, co-author
Dec 2, 2024
Canadian Tax Journal, Vol. 72, No. 4, (Canadian Tax Foundation)
Read More

Speaking Engagement
STEP Canada, "Cross Border Tax and Estate Planning Issues"; Montréal, QC
Sep 28, 2023

Speaking Engagement
Co-Chair, PAC Seminar for Accounting and Legal Professionals, Financial Advisors and Estate Planners; Montréal, QC
Jun 13, 2023

Article
New Canadian real estate rules regarding non-resident ownership, co-author
May 1, 2023

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Financier Worldwide, ExpertBriefing
Read More

Speaking Engagement
Canadian Tax Foundation, 74th Annual Tax Conference, "Family Offices – Tax and Other Considerations with Running an Effective Family Office"
Nov 27, 2022

Speaking Engagement
STEP Canada, 24th National Conference, "Cross Border Tax Issues and How to Solve Them"; Webinar
Jun 16, 2022

Speaking Engagement
The Jewish Community Foundation of Montreal, "Beware Canadians – What You Need to Know About Cross Border Issues"; Montréal, QC
May 19, 2022

Article
Canadian Supreme Court Endorses Treaty Shopping Arrangement, co-author
Mar 9, 2022
IFC Review
Read More

Speaking Engagement
Canadian Bar Association, "Canada-US Cross-Border Tax and Estate Planning Matters"; Webinar
Feb 10, 2022

Speaking Engagement
Accountant Study Group, "Canadian Legislative and Technical Tax Update"; Montréal, QC
Jan 18, 2022

Speaking Engagement
Association de planification fiscale et financière, Annual Conference 2021, "Mise à jour sur les fiducies non résidentes"; Webcast
Oct 8, 2021

Article
Supreme Court of Canada to Render Treaty Shopping Decision, co-author
May 12, 2021
IFC Review
Read More

Speaking Engagement
Accountant Study Group, "Estate Planning in Uncertain Times"; Montréal, QC
Jan 19, 2021

Speaking Engagement
McGill University Faculty of Medicine and Health, McGill Cares Webcasts, "Planning for the Future and Protecting a Loved One's Finances; Webinar
Sep 23, 2020

Speaking Engagement

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Chartered Professional Accountants Canada, Accounting Study Group, "Canada-U.S. Tax Issues; Montréal, QC
Jan 28, 2020

Article
Letter to the Editor: Recent Changes to Canada's Income Tax Laws Affecting Cross-Border Trusts and Estates: An Update, co-author
Dec 23, 2019
Tax Notes International, Vol. 96, No. 12 (Tax Analysts)
Download Article

Speaking Engagement
Canadian Tax Foundation, 71st Annual Tax Conference, "Federal and Provincial Tax Considerations Relating to Non-Resident Investment in Canadian Real Estate"; Montréal, QC
Dec 2, 2019

Article
Recent changes to Canada's Income Tax Laws Affecting Cross-Border Trusts and Estates, co-author
Oct 28, 2019
Tax Notes International, Vol. 96, No. 4 (Tax Analysts)
Download Article

Speaking Engagement
Senior Estates & Trusts Practitioners' Forum, "The Estate Freeze from Hell"; Toronto, ON
Jun 6, 2019

Article
Risks of Assigning a Trust Interest, co-author
Jun 1, 2019
Canadian Tax Highlights, Vol. 27 No. 6
Download Article

Speaking Engagement
Senior Estates & Trusts Practitioners' Forum, "The Impact of US Tax Reform on Cross-Border Estate Planning"; Cambridge, ON
Oct 15, 2018

Article
Canada-U.S. Investment: Canadian Tax Perspective - Elimination of 30-Day Requirement and Impact on Cross-Border Estate Planning, co-author
Jun 8, 2018
Tax Management International Forum, Vol. 47, Issue 6 (Bloomberg TAX)
Download Article

Speaking Engagement
Lord Reading Law Society, "The Impact on Professionals of Tax Reform Proposals Regarding Private Corporations"; Montréal, QC
Dec 5, 2017

Speaking Engagement
Canadian Bar Association, Will, Estate and Trust Fundamentals for Estate

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Practitioners Conference
Oct 15, 2015

Speaking Engagement
Canadian Tax Foundation, seminar, "A Critical Analysis of the Impact of Recent Case Law on Corporate Reorganizations"
May 1, 2012

Speaking Engagement
Tax Executives Institute, seminar, "Changements législatifs et interprétations administratives récents"
Mar 21, 2012

Insights

Lexpert Highlights Davies' Expertise in Insolvency and Restructuring
Oct 7, 2026

Davies Lawyers Recognized by *Best Lawyers*
Sep 3, 2026

Chambers High Net Worth Once Again Recognizes Davies
Jul 23, 2026

Lexpert Recognizes Davies' Finance Expertise
Apr 15, 2026

Lexpert Affirms Davies' Position as a Leading Firm
Mar 17, 2026

Chambers High Net Worth Once Again Recognizes Davies
Jul 24, 2025

Davies Partners Co-Author *Canadian Taxation of Trusts*, 2nd ed.
Apr 24, 2025

Lexpert Special Edition Recognizes Davies' Expertise in Finance
Apr 16, 2025

Select U.S. Tax Developments
Jan 31, 2025

Highlights of Canada's Latest Legislative Tax Proposals
Aug 23, 2022

Federal Budget 2022: Tax Highlights
Apr 8, 2022

Davies Maintains Top Ranking in *Chambers High Net Worth* 2021
Jul 22, 2021

Education

McGill University, BCL/LLB, 1996
University of Western Ontario, BA (Administrative & Commercial Studies), 1992

Bar Admissions

Québec, 1997

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Community Involvement

American College of Trust and Estate Counsel, State Chair for Eastern and Central Canada
American College of Trust and Estate Counsel, International Estate Planning Committee
Forum for Senior Estates & Trusts Practitioners - 1st Generation Steering Committee
Jewish Community Foundation of Montréal, Professional Advisory Committee, former co-chair
Montréal Children's Hospital Foundation, Planned Giving Advisory Committee
STEP Canada/STEP USA, inaugural Conference Planning Committee

Teaching Engagements

Rhonda is a frequent lecturer at McGill's Tax Law program.

Board Memberships

American College of Trust and Estate Counsel, State Chair for Eastern and Central Canada
Royal West Academy Foundation, former director

Professional Affiliations

American College of Trust and Estate Counsel, international fellow
Canadian Bar Association
Canadian Tax Foundation
International Fiscal Association
Society of Trust and Estate Practitioners
International Academy of Estate and Trust Law