Rachael Rofe

Intergenerational Wealth Transfer Lawyer
Estate Planning & Structured Philanthropy Specialist

Expert counsel, education and strategy for the most consequential financial conversations families and their advisers will ever have.

ABOUT

Rachael Rofe is an intergenerational wealth transfer lawyer and the former steward of Australia's largest donor-advised fund platform. With over two decades in estate planning and structured giving, she works with families and their advisers on the full arc of wealth transfer: lifetime giving, family governance, philanthropy and testamentary planning as a single, coherent strategy.

Rachael's work sits at the intersection of wealth transfer, family governance and structured philanthropy. She focuses on helping families and their advisers navigate how wealth, responsibility and values move across generations.

CREDENTIALS

20+ years	Estate planning, structured giving and wealth transfer
$500M+	Philanthropic capital overseen at Australian Philanthropic Services
700+	Families supported in lifetime and testamentary giving

SPEAKING TOPICS

– Australia's intergenerational wealth transfer — scale, context and family implications
– Structured philanthropy: giving funds, private ancillary funds and multigenerational giving
– Estate planning and testamentary structures for complex family situations
– Family governance and preparing the next generation for stewardship
– Superannuation and estate integration
– The Transfer Series: four-session workshop program for adviser practices

THE TRANSFER SERIES

A structured four-session education program for adviser practices and their clients, covering the technical, relational and generational dimensions of intergenerational wealth transfer. Available as individual sessions or as a complete series.

01 **So, What Do You Want Your Wealth To Do?**
Client keynote or hosted event

02 **Families who give together, stay together.**
Adviser practice development workshop

03 **What the estate lawyer sees. A map for advisers.**
Technical adviser workshop

04 **Heirs are not yet clients.**
Generational adviser and client workshop

SELECTED MEDIA

Firstlinks	Authored	$5.4 trillion wealth transfer poses deep questions on legacy
The Australian	Authored	How funds offer a smarter way to donate
The Australian	Authored	Tax deductions should be a focus for donors ahead of June 30
Australian Financial Review	Quoted	Giving booms as donors maximise tax benefits
Australian Financial Review	Quoted	Eight ways high earners can maximise their tax return
Accountants Daily	Authored	Maximising tax benefits through giving structures

MEDIA & SPEAKING ENQUIRIES

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PRACTICE

Intergenerational Wealth Transfer

Estate Planning & Structured Philanthropy

High-resolution headshots available on request. This media kit is current as at 2025.