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# Estates & Trusts

## Profile

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Building wealth takes a combination of creativity, diligence and hard work. Preserving it to carry out the matters and goals most important to the particular individual and family requires careful planning, sound advice and diligent advocacy-which is exactly what we provide.

### Services

- > Trust and Estate Planning
  - > Helping our clients structure their affairs, ranging from modest estates to complex business enterprises, to ensure that their planning objectives are carried out in a tax-efficient and protected manner
- > Administration
  - > Advising executors, trustees and other fiduciaries on how to carry out their role efficiently while minimizing legal risks
- > Estate Litigation
  - > Bringing a unique depth of trial and mediation experience on trust and estates matters, including variation claims, contested accountings and interpretation issues
- > Incapacity
  - > Protecting vulnerable adults facing diminished capacity through careful planning and, when necessary, through court-appointed guardianship applications
- > Tax
  - > Navigating and minimizing our clients' tax obligations at all stages, including through corporate reorganizations, succession of private businesses and tax minimization on death

> Charities

- > Representing a number of charities and non-profits, ranging from private family foundations to some of British Columbia's best known organizations. We assist on many fronts, including establishing new structures, planned giving, defending charitable gifts and advising on governance and compliance issues

Our ability to draw upon other expertise in our firm as needed, including real estate, corporate law, and family law, enables us to provide integrated service in a cost-effective manner. We also work closely with other external advisors, including financial and investment advisors and accountants, believing that the best results are achieved when professionals put their minds together.

A point of pride for us is our experience, legal acumen and integrated approach:

- > Our diverse group of lawyers has many years of experience focused on estates, trust and tax matters and are involved in many leading industry organizations
- > Many lawyers in our group have made significant contributions to various legal publications and frequently lecture at industry training seminars and forums
- > With diverse strengths and areas of specialty, we leverage collective resources to provide clear and practical solutions for even the most complicated problems

Our clients include individuals and families who have complexities arising from their families and their business and financial affairs. We act for professional trust companies seeking legal assistance on complex estates, and we act for charities and non-profits seeking to maximize their resources. They all look to us for advice on navigating the legal challenges in the estates, trusts and tax realm.

## **Co-Chairs**

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