

WILLS, ESTATES + TRUSTS



We help our clients create and protect their legacy. We do this by listening to their unique needs and desires and provide planning and advice accordingly.

Our team includes leading industry experts in this field. Members of our team annually contribute to the Probate and Estate Administration Practice Manual (BC), and have written the plain language will precedents that are used throughout British Columbia and appeared at the Supreme Court of Canada on a recent matter involving trust assets.

OUR EXPERTISE

We assist clients in creating and preserving wealth through estate planning, estate administration, mediation and litigation. Our clients include individuals, family businesses, financial institutions, trust companies, charities, hospitals and universities. We provide on-site seminars on estate planning to interested companies, organizations and groups. We also conduct business succession planning for family businesses.

OUR SERVICES

Our estate planning services include advising on and preparing Wills and family law agreements, assisting with planning for incapacity, structuring and implementing trusts and assisting with adult guardianship matters. We develop comprehensive strategies to minimize taxes and other financial burdens on clients' estates and to protect beneficiaries from needless expense and frustration. We also assist with planned giving for charitable purposes. We provide comprehensive advice to business owners regarding estate freezes, corporate reorganizations, shareholders agreements and succession planning. We represent clients making applications for adult guardianship. We also advise on the responsibilities of trustees and guardians and the use of enduring power of attorney instruments. We provide advice to both individuals and institutions regarding the preparation and use of Representation Agreements and Advance Directives or Personal Directives.

Acting as an Executor or Administrator is a serious and demanding responsibility. We assist our clients in completing all steps in the proper administration of an estate including: locating wills, locating, collecting and safeguarding assets, preparing all documents necessary to obtain Court approval of the appointment of a Personal Representative, advising on dealing with income taxes and other estate liabilities, preparing and passing the Personal Representative's Accounts, attending to asset distributions

TEAM LEADER



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(including land transfers), and assisting in the administration of ongoing trusts for minors or lifetime beneficiaries.

In addition to our work with individuals, we also advise trust companies and institutions in administering estates. We work closely with professionals in the areas of accounting, trust administration, banking, financial planning, insurance and investments, to provide you with comprehensive and well-coordinated service.

INDUSTRY INVOLVEMENT

We are actively involved in:

- [The Canadian Bar Association, BC Branch, Vancouver Wills and Trusts Section](#)
- [The Estate Planning Council of Vancouver](#)
- [The Society of Trust and Estate Practitioners](#)
- [The Canadian Association of Gift Planners](#)
- [The Continuing Legal Education Society of BC](#)
- [Pacific Business & Law Institute](#)

OUR LITIGATION WORK

The loss of a family member or loved one is always a difficult time and even more troubling where it gives rise to litigation. We are experienced in handling all types of disputes involving wills and estates. Our team believes in a solution-oriented approach to litigation management. We recognize that our clients are each dealing with unique and often very personal circumstances and we need to develop strategies that will fit their needs.

We represent clients at all levels of court and in alternative dispute resolutions such as mediations regarding estate litigation arising from contested Wills, wills variation claims made pursuant to the *Wills, Estates and Succession Act*, trust variations, constructive trust claims and other estate-related matters.

We have acted in many disputes arising from improper will execution, incapacity, undue influence, poor drafting and the use of the courts' power to interpret and save charitable gifts. We represent claimants, beneficiaries and estates in wills variation claims by disappointed spouses or children. We represent trustees, pension managers, and disappointed beneficiaries in disputes arising from the administration of trusts, or investment by trustees, trustee compensation and the passing of trustee accounts. We prosecute and defend unjust enrichment and constructive trust claims.

