WILLS, TRUSTS & ESTATES

When you have worked a lifetime to build a legacy, you want to ensure you carefully plan for your estate's eventual management and disposal.

Customized legal advice is essential to ensure estate documents accurately reflect your intentions, taxes are minimized, and disputes avoided. Our estate lawyers assist with all aspects of estate planning and dispute resolution, helping to draw up estate and trust documents, advising executors and trustees on the legal and administrative responsibilities of estate administration, and representing clients in estate challenges and defences.

Practice Group Co-Chairs:

LUCINDA (LUCY) MAIN
PARTNER

Lucy's practice focuses exclusively on estate and trust planning and administration. She helps with the smooth and efficient administration of estates and trusts, particularly where there are private company shares, valuable artwork or other collectables and foreign assets involved. Since 2020 she has been recognized by *Best Lawyers in Canada* as a leading lawyer in Trusts and Estates and in August 2023 was recognized by the organization as "Lawyer of the Year – Toronto" in Trusts and Estates.

ANDREA MCEWAN
PARTNER

Andrea exclusively practises in the areas of wills, estates, trust, fiduciary and capacity-related litigation, Andrea possesses a deep knowledge of matters pertaining to passing of estate, attorney, guardian & fiduciary accounts, probate applications, guardianship issues, power of attorney disputes, and end-of-life and treatment decisions; and matters of elder law. Andrea represents a wide range of clients including beneficiaries, trustees, executors, attorneys pursuant to powers of attorney, individuals found to be incapable of managing their property or personal care, and concerned family members.

FOR MORE INFORMATION ON THE WILLS, TRUSTS AND ESTATES SERVICES THAT WE OFFER, PLEASE CONTACT LUCINDA MAIN:

PHONE: 647.715.3568

EMAIL: LMAIN@WEIRFOULDS.COM

WeirFoulds LLP

SUCCESSION PLANNING

Succession planning is crucial in creating a truly successful family business and it's never too early to start planning. We assist our clients in planning for and managing intergenerational transfers of family enterprises. Our lawyers understand the unique issues faced by family business structures. In planning, we are able to find the crucial balance between the personal needs and desires of family members and the ongoing success of the business.

OUR PRACTICE

We provide estate-planning and trust services from simple wills to more complex tax-effective succession plans, trusts, estate freezes and powers of attorney. Our lawyers assist with the administration of estates and in this regard we frequently act as executors and estate trustees.

ESTATE LEGAL PROCEEDINGS

The size of our practice allows us to stay closely connected with each client and their individual needs. We have experience in will challenges, all kinds of dependant's relief matters, passing of accounts, guardianship and variations of trust. Our lawyers also act as mediators in these types of disputes. We regularly represent clients in mediations and court proceedings related to trusts, estates and capacity issues.

OUR EXPERTISE

- Will & trust interpretation
- Trusts
- Estate planning
- Estates administration
- Tax planning
- Passing of accounts
- Estate litigation
- Alternative dispute resolution
- Guardianship

OUR TEAM

Caroline Abela
Partner

Clare Burns
Partner

Jennifer Corak
Partner

Jonah Waxman
Partner

Carissa DeMarinis
Associate

Lori Isaj
Associate

Sanaya Mistry
Associate

John Siferd
Associate

THE WEIRFOULDS DIFFERENCE

WeirFoulds LLP has established itself as one of Canada's premier regional law firms and has provided strategic, cost-effective and innovative legal advice to our clients since 1860. WeirFoulds is focused on four areas of practice: (1) Litigation; (2) Corporate; (3) Property; and (4) Government Law. Within these core areas, as well as our key sub-specialities such as wills and estates, we meet the most complex and sophisticated legal challenges presented by our clients.

MULTI-DISCIPLINARY APPROACH

In addition to our expertise in assisting private clients, we also offer a range of corporate services. This overlap means we are able to take a multi-disciplinary approach to our estate files, engaging our corporate, commercial and tax lawyers as necessary to ensure our clients receive excellent advice that is tailored to their needs.