

Estates & Trusts Planning & Administration

Planning in the event of death or incapacity involves making some of life's most difficult and emotional decisions. Led by three senior members of the Aird & Berlis Estates & Trusts Group, our experienced and highly-regarded estate and trust planning team provides trusted advice to help clients structure their affairs in a manner that coincides with their personal and financial objectives. We employ an individualized approach to ensure that each plan meets the specific needs of our clients and their families.

With a focus on minimizing both estate administration tax (formerly known as probate fees) and taxation on death, we combine the best estate and trust planning techniques, including: multiple wills; bare trust ownership structures; joint ownership of assets; beneficiary designations on assets such as RRSPs, RRIFs, TFSAs and insurance policies; charitable donations; and inter vivos trusts for various purposes such as ownership of vacation property and for disabled persons. Our estate and trust planning professionals also work closely with the members of the firm's Tax Group, designing and implementing plans for the succession of family businesses.

Our clients include high-net-worth individuals, family business owners, individuals with foreign assets or citizenship of another country, families with disabled children and, generally, persons who require our expertise in the planning of their estates. We also provide legal advice to executors, attorneys and trustees who are administering estates, assets or trusts, ensuring that they carry out their duties and obligations properly.

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