

Estates & Trusts

With expertise that spans estate and trust planning, cross-border planning, estate and trust administration, trust and estate litigation, charity law and related areas of tax law, the Aird & Berlis Estates & Trusts Group provides comprehensive services to a variety of clients. We draw upon the expertise and depth of our group, presently composed of eleven lawyers and three law clerks, to help our clients achieve their personal and financial goals.

In the context of our planning work, we employ many techniques to meet the specific needs and planning objectives of our clients and to minimize taxes. Strategies include the use of multiple wills, testamentary and inter vivos trusts, nominee ownership, rights of survivorship, domestic contracts, powers of attorney for property and for personal care, and charitable giving. Our professionals often work with tax and estate advisors in other jurisdictions where there are foreign assets or foreign citizenship/residency issues.

We routinely advise fiduciaries (i.e. executors, trustees, guardians and attorneys) on the administration of estates, trusts and powers of attorney for property and for personal care, offering guidance on the nature and scope of their duties. We also assist fiduciaries with the passing of their accounts.

Our litigators act in a wide range of estate and trust related disputes, including: representing clients in claims involving challenges to the validity of wills, trusts or powers of attorney; claims arising in the administration of estates and trusts; equalization claims under the *Family Law Act*, dependant support relief claims under the *Succession Law Reform Act*, claims against executors, trustees and attorneys for breach of trust; applications to the courts for advice and direction; proceedings to appoint, remove or replace trustees and guardians; applications to vary trusts and wills; and the passing of accounts of executors, trustees and attorneys.

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