



Michelle Isaak

Partner

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Michelle Isaak is a partner who practises in the area of personal wealth management. She has extensive experience advising clients on all aspects of estate and trust planning, adult guardianship and capacity planning, and estate and trust administration.

Michelle assists clients with developing individualized estate plans which incorporate tax, succession and familial considerations. She advises clients on the preparation of wills, powers of attorney, and representation agreements, the settlement of alter ego, joint spousal and family trusts, the complexities of planning for a blended family, and business succession.

A significant portion of Michelle's practice is devoted to advising executors, trustees and beneficiaries on estate and trust administration issues, such as obtaining or resealing representation grants, administering assets and trusts in a tax efficient manner, resolving disputes between trustees and beneficiaries, replacing trustees, and passing accounts, both informally and through the B.C. Supreme Court.

Michelle has particular expertise in complex estate planning and administration issues, such as planning for and administering estates with assets in multiple jurisdictions, planning for and administering Indigenous estates under the *Indian Act*, administering insolvent estates, and advising trustees in cases where the deceased has been murdered by a beneficiary.

Michelle is an active volunteer for the Continuing Legal Education Society of British Columbia, serving on the editorial board of the *BC Probate and Estate Administration Practice Manual*, as a contributing author to the *BC Estate Planning and Wealth Preservation Practice Manual*, and as a speaker at numerous CLE conferences and webinars. She presents frequently on the subject of wills, trusts and estate administration for organizations such as the Pacific Business and Law Institute, Society of Trust and Estate Practitioners (STEP), UBC Indigenous Community Legal Clinic, CBABC, and the Estate Planning Councils of Vancouver, Abbotsford and Fraser Valley. In June 2020, Michelle was featured in CLEBC's "In the Spotlight" for her numerous contributions to the legal field.

Michelle has been listed in the *Best Lawyers in Canada* directory for Trusts and Estates since 2018, including being recognized as the 2019 "Lawyer of the Year" for Trusts and Estates in Vancouver, and is recognized by Lexpert® as a leading practitioner in the field of estate and tax planning.

RELATED SERVICES

- Family Law
- Wills, Estates and Trusts

LANGUAGES SPOKEN

English

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- English

CREDENTIALS

Admissions

- British Columbia, 2004

Recognitions

- *Canadian Legal Lexpert® Directory* (Estate & Personal Tax Planning), 2020
- Lawyer of the Year, *Best Lawyers in Canada* (Trusts and Estates: Vancouver), 2019
- *Best Lawyers in Canada* (Trusts and Estates), 2018-2021

Education

- LL.B., University of British Columbia, 2002
- B.Comm., McGill University, 1990

Memberships

- Member of CBA Wills & Trusts (Vancouver) Section

Community Involvement

- Board Member, Bowen Island Family Place Society, 1998-2000
- Board Member, Bowen Island Preschool and Daycare Society, 2000 - 2002
- Board Member, Cottage Farm Centre for Mental Health Recovery Society, 2008 - 2014
- Board Member, Island Pacific School, 2011 - 2014

INSIGHTS

Publications

Bill 21 allows for electronic wills and the use of remote signatures in British Columbia

14 September 2020

On August 14, 2020, Bill 21: Wills, Estates and Succession Amendment Act, 2020 received Royal Assent. Bill 21 currently permits a will-maker and witnesses to the will to be electronically present rather than physically present when the will is signed. Bill 21 will also permit the making of electronic wills, the use of electronic signatures, and additional methods of altering and revoking electronic wills when these provisions are brought into force by regulation of the Lieutenant Governor in Council.

- Co-author, "The Administration of Firearms - Advice for the Personal Representative," *Estates, Trusts & Pensions Journal*, May 2018

Events

SPEAKING ENGAGEMENTS

- Presenter, "Practicing Wills, Estates and Trust Law during Covid-19", CLEBC Webinar, April 2020.
- Presenter, "Valuing Assets for Probate and P14 Amendments", CLEBC Conference, *Estate Planning Express 2020*, March 2020.
- Co-Presenter, "Thorny Estate Administration Issues – A Multidisciplinary Perspective", STEP Vancouver Branch, March 2020.
- Presenter, "Estate Planning and Administration for Indigenous Clients", CBABC, *Wills & Estates Conference 2019: Tackling Challenging Issues in Estate Law*, September 2019.
- Presenter, "How to test for Testamentary Capacity: A Demonstration", Trial Lawyers Association of BC, *Estate & Family Law Summit*, April 2019.
- Co-Presenter, "Death in the Digital Age: Dealing with Digital Assets and Intangible Property on Death", Estate Planning Council of Vancouver, Feb 2019
- Presenter, "The Trust as a Challenged Asset in Family Law Claims", CLEBC Conference, Estate Litigation Update 2018, November 2018
- Presenter, "Administration of Estates under WESA", Pacific Business & Law Institute Conference, *The WESA Effect: Where Are We Now?*, Sept 2018
- Co-Presenter, "Digital Assets", CBABC Wills & Trusts (Vancouver) Section, Jan 2018
- Co-Presenter, "Death in the Digital Age: Dealing with Digital Assets and Intangible Property on Death", CBABC Wills & Trusts (Vancouver) Section, Jan 2018
- Presenter, "Alter Ego and Joint Partner Trusts and the LTO - How to deal with title", CLEBC Conference, *Estate Planning Express*, Apr 2017
- Presenter, "Responsibility for Death", Pacific Business & Law Institute Conference, *Complex Issues in Estate Administration*, Jan 2017
- Co-Presenter, "Probate Practice and Pitfalls", Society of Trust and Estate Practitioners (STEP), Jan 2017
- Co-Presenter, "Multiple Wills – Planning and Administration", CLEBC Conference, Estate Planning Update, Oct 2016
- Co-Presenter, "Ensuring you have the appropriate trustee", Pacific Business & Law Institute Conference, *Trusts 2016: Using Trusts Effectively*, June 2016
- Co-Presenter, "Rule 25 - The Good, The Bad and The Ugly," Canadian Bar Association of BC (CBABC) Wills & Trusts - Vancouver Section Meeting, Oct 2015
- Presenter, "Other Tools: Joint Tenancies, Life Insurance and Benefit Plans," CLEBC Conference *Estate Planning for Blended Families*, May 2015
- Co-Speaker, "Estate Matters in Family Law Practice," Canadian Bar Association of BC (CBABC) Family Law Section Meeting, Apr 2015
- Co-Presenter: "Practical Tips for Dealing with Beneficiaries, Assets and Advisors in Other Jurisdictions", Pacific Business & Law Institute Conference, *Planning for Clients with Assets and Beneficiaries in Multiple Jurisdictions*, Nov 2014
- Conference Co-Chair, CLEBC Conference, "WESA for Family Lawyers", Oct 2014.
- Co-Presenter, "Children and Issues Arising under WESA," CLEBC Conference, *WESA for Family Lawyers*, Oct 2014
- Co-Presenter, "Digital Assets and Death", CLE-TV webinar, Sept 2014
- Co-Presenter, "Wills And Estates- New Legislation And The Impact On Family Law," CBABC Family Law (Vancouver) Section Meeting, May 2014

NEWS

DLA Piper Canada increases rankings in 2021 edition of *Best Lawyers in Canada*

28 AUG 2020

DLA Piper (Canada) LLP is pleased to see 79 of our lawyers across 35 practice areas recognized in the 2021 *Best Lawyers in Canada* guide, resulting in our best showing with the guide since its inception.

DLA Piper (Canada) LLP increases rankings in the 2020 *Canadian Legal Lexpert Directory*

24 APR 2020

DLA Piper (Canada) LLP is pleased to announce that we have significantly increased the number of lawyers ranked as leading practitioners in the 2020 edition of the Canadian Legal Lexpert Directory.

DLA Piper (Canada) LLP top fundraiser at the 12th Annual Pro Bono Going Public

16 OCT 2019

DLA Piper (Canada) LLP once again placed amongst top fundraisers during the 12th Annual Pro Bono Going Public advice-a-thon held in Vancouver.

Pro Bono Going Public 2019

28 AUG 2019

DLA Piper (Canada) LLP will once more sponsor Pro Bono Going Public, a free outdoor legal advice-a-thon organized by the Access Pro Bono Society of British Columbia.

DLA Piper Canada lawyers recognized in 2020 edition of *Best Lawyers in Canada*

21 AUG 2019

DLA Piper (Canada) LLP is pleased to see 70 of our lawyers across 34 practice areas recognized in the 2020 *Best Lawyers in Canada* guide.

MEDIA MENTIONS

- Interview, "In the Spotlight," Continuing Legal Education Society, June 2020
- Quoted, "Give away wealth now, or later," Advisor.ca, January 11, 2015