



Wills, Estates and Trusts

DLA Piper's Wills, Estates and Trusts practice has a wide range of experience in all aspects of wills, trusts and estates and related litigation.

Planning

We work closely with the firm's Tax group to provide individuals, families and business clients with comprehensive advice tailored to their specific needs to ensure the orderly succession of assets to the next generation including reducing or eliminating probate fees and minimizing or deferring tax on capital gains, to meet any philanthropic desires and to prepare for the possibility that those individuals may become unable to take care of themselves or manage their assets.

Areas of experience include the following:

- Complex estate planning, including wills, alter ego, joint partner or other trusts
- Planning for potential incapacity including powers of attorney tailored to specific individual and corporate needs, nominations of committee and representation agreements
- Post-mortem tax planning
- Corporate and share structures, shareholder arrangements, and trusts for shares
- Estate planning for families of persons with disabilities and special needs and advising organizations which assist the disabled community
- Estate planning for disabled individuals
- Adult guardianship, including the appointment of a committee (personal or property guardian)
- End-of-life decision making
- Representing and advising charities as beneficiaries of an estate or trust
- Passing of executor, trustee or committee accounts
- All aspects of trust and estate administration.

If you wish our help probating a will or administering an estate in BC, please contact a member of our group for our comprehensive estate questionnaire.

Litigation

We represent beneficiaries, trustees, executors and other personal representatives in disputes relating to wills and estates, including:

- Wills variation actions under the *Wills, Estates and Succession Act*

RELATED SERVICES

- Litigation, Arbitration and Investigations
- Tax

- The validity of a will, including allegations of undue influence or incapacity of the deceased
- Court applications to interpret the provisions of a will
- Contested passing of executor, trustee or committee accounts
- Breach of trust actions

Emerging Issues

- Family-run businesses seeking orderly succession planning to smoothly transition their businesses to the next generation
- Newly created opportunities to defer income tax and avoid probate fees through joint partner, alter ego and other trusts
- Longer life spans increase the risk of a loss individuals' cognitive faculties, increasing the need for living wills, powers of attorney, nominations of committee and representation agreements
- Second marriages and common-law relationships lead to sometimes-forgotten yet critical changes in wills, trusts and other estate or personal planning documents
- Mentally or physically challenged adults require plans for ongoing care when their primary caregivers can no longer care for them.

Our Clients

- High-net-worth families and individuals
- Owners of family-run businesses
- Individuals as executors and trustees, and trust companies in that capacity
- Charities and not-for-profit organizations
- Parents of disabled children
- Disabled individuals as beneficiaries

Experience

Our group has authored various texts on trusts, wills and estates for the Continuing Legal Education Society of British Columbia (CLE). Two of our lawyers co-authored *Will Precedents: An Annotated Guide*, updated annually, as well as the chapter entitled "Planned Charitable Giving" in the *British Columbia Estate Planning & Wealth Preservation* publication, updated annually. *The British Columbia Probate & Estate Administration Practice Manual*, Second Edition, was co-authored and edited by three of our lawyers with annual updates. Our group authored the "WESA Annotated" chapter in the *Wills, Estates and Succession Act Transition Guide*, and three of our group members co-authored the WESA annotations and Estate Administration Act annotations in the *Annotated Estates Practice 2016* publication.

Our Wills, Estates and Trusts group members have been recognized as leaders in their field by *Martindale-Hubbell*, *Best Lawyers in Canada* and the *Canadian Legal Lexpert Directory*.

NEWS

DLA Piper announces launch of Artificial Intelligence practice

14 MAY 2019

DLA Piper announced today the launch of its Artificial Intelligence practice, which will focus on assisting companies as they navigate the legal landscape of emerging and disruptive technologies, while helping them understand the legal and compliance risks arising from the creation and deployment of AI systems.

DLA Piper announces partnership promotions for 2019

1 APR 2019

DLA Piper is proud to announce that 77 lawyers have been promoted to its partnership. The promotions are effective as of April 1, 2019 in the United States and May 1, 2019 for EMEA and Asia Pacific. The promotions were made across many of the firm's practice areas in 43 different offices throughout 20 countries.

Non-resident real estate investors bullish on Capital Gains Tax changes

19 MAR 2019

Non-resident real estate investors are holding their nerve on UK investment strategies despite impending capital gains tax (CGT) changes coming into force next month and uncertainty around Brexit. According to a DLA Piper report, more than half (58 percent) of those polled expect the new tax code will have no impact on their investment strategy.

DLA Piper announces launch of Blockchain and Digital Assets practice

26 FEB 2019

DLA Piper announced today the launch of its Blockchain and Digital Assets practice, which will offer strategic advice on a global basis to address the needs of companies implementing blockchain technology solutions and creating and deploying digital assets.

DLA Piper enhances cross-border tax capability with new partner hire in Dublin

26 FEB 2019

DLA Piper today announces the appointment of Maura Dineen as a Tax partner in the firm's newly opened Dublin office. This is the fifth partner hire for DLA Piper in Dublin in a month, following the announcements in January of Conor Houlihan (Finance & Projects), Éanna Mellett (Corporate), Mark Rasdale (Intellectual Property & Technology) and Ciara McLoughlin (Employment).

DLA Piper (Canada) LLP recognized in 2019 *Legal 500 Canada* guide

7 DEC 2018

DLA Piper (Canada) LLP is pleased to announce that 42 firm lawyers across 17 practice areas have been recommended in the latest edition of the *Legal 500 Canada*.

Best Lawyers in Canada 2019 recognizes 72 DLA Piper (Canada) LLP Lawyers

22 AUG 2018

DLA Piper (Canada) LLP is pleased to have once more increased its rankings in the 2019 edition of *Best Lawyers*, with close to one-third of the firm's lawyers recommended as leading practitioners in Canada across key practice areas.

DLA Piper Africa welcomes Zimbabwe member firm

19 JUN 2018

DLA Piper Africa has announced that leading Zimbabwean law firm, Manokore Attorneys, is joining as the member firm in

Zimbabwe.

DLA Piper takes home eight awards at 2018 International Tax Review European Tax Awards

18 MAY 2018

DLA Piper has won eight awards at the International Tax Review European Tax Awards 2018, in a ceremony that took place on Thursday, May 17, 2018 at the Savoy Hotel in London.

The firm has been named UK Transfer Pricing Firm of the Year, Spain Tax Firm of the Year and Gulf Cooperation Council Tax Firm of the Year.

DLA Piper Canada welcomes Jessica Sullivan

9 APR 2018

DLA Piper (Canada) LLP is pleased to welcome Jessica Sullivan to the firm's Vancouver office as an associate in the Wills, Estates and Trusts group.

DLA Piper announces partnership promotions for 2018

3 APR 2018

DLA Piper is proud to announce that 62 lawyers have been promoted to its partnership. The promotions are effective as of 1 April 2018 in the United States and 1 May 2018 for EMEA and Asia Pacific. The promotions were made across many of the firm's practice areas in 42 different offices throughout 20 countries.

DLA Piper advises Cabinet Group on Funcom joint venture

9 FEB 2018

DLA Piper represented Cabinet Group LLC on tax and Norwegian law matters in its joint venture with Funcom N.V., a Norwegian developer, to establish Heroic Signatures.

DLA Piper launches Middle East Tax practice

4 DEC 2017

DLA Piper has strengthened its International Tax practice with the appointment of Ton van Doremalen as partner and Head of Tax in the Middle East. Ton joined the firm's Dubai office on 3 December 2017.

DLA Piper (Canada) LLP expands rankings in *Legal 500 Canada*

1 DEC 2017

DLA Piper (Canada) LLP is pleased to have achieved its best showing to date in *Legal 500 Canada*, with 11 lawyers gaining new rankings in the newly released 2018 edition.

DLA Piper launches Finance Rules of the World

2 Nov 2017

DLA Piper's global Finance & Projects practice has today launched Finance Rules of the World, a knowledge site for clients, which summarizes key legal questions and answers to be considered when initially looking at financing or investing in particular jurisdictions.

Adrienne Woodyard provides key insights into CRA audits in video series hosted by *Investment Executive*

27 SEP 2017

Toronto tax partner Adrienne Woodyard provides tips for managing tax audits in a video series titled "Advisors and the CRA: Managing mistakes, audits and penalties."

DLA Piper launches new platform for *Guide to Going Global* series

20 SEP 2017

DLA Piper has launched a new platform featuring its *Guide to Going Global* series, an online resource designed to help companies operating and growing their international businesses.

Christopher Ross joins DLA Piper Canada LLP's Tax Group in Vancouver

11 SEP 2017

Christopher practises in the area of corporate and personal income tax, with particular emphasis on corporate reorganizations, mergers and acquisitions, and personal tax and estate planning. He also provides tax advice to donors, charities and other not-for-profit organizations.

DLA Piper (Canada) LLP achieves strongest showing to date in *Best Lawyers*

22 AUG 2017

DLA Piper (Canada) LLP has once again garnered top rankings in *Best Lawyers in Canada*, with close to one-third of the firm's lawyers ranked across 34 practice areas.

In Canada

- Best Lawyers in Canada, 2012-2018