

## CANADA

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### **MARGARET R O'SULLIVAN**

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Margaret O'Sullivan's practice involves all aspects of private client work, including estate planning; will and trust planning; incapacity planning; estate dispute resolution; advising executors, trustees and beneficiaries; and administration of estates and trusts, both domestic and multijurisdictional. Margaret is recognised in *The Best Lawyers in Canada* (2019), *Legal Week's Private Client Global Elite 2018* and the 2019 edition of *The Canadian Legal Lexpert Directory* as a leading practitioner in estate planning; and in *WWL: Private Client* (2018) and *WWL: Canada* (2018) as one of the most highly regarded private client practitioners. She is ranked as Band 1 in *Chambers: High Net Worth Guide 2018* in private wealth law among seven Canadian lawyers with this highest ranking. She is the recipient of the 2014 STEP Founder's Award for Outstanding Achievement and the Ontario Bar Association's 2013 Award of Excellence in Trusts and Estates Law. Prior to establishing a boutique trust and estate legal firm over 20 years ago, Margaret was a partner in the Toronto office of the national Canadian law firm Stikeman Elliott, where she directed its trusts and estates practice. She has practised exclusively in the area of trusts and estates since 1983.

Margaret is a former deputy chair and member of the board of directors and council for STEP Worldwide, as well as a former chair of its professional standards committee. She is a founding member and a former deputy chair of the Society of Trust and Estate Practitioners (Canada) and former chair of the editorial board of its newsletter *STEP INSIDE*. She is a former chair of the trusts and estates section of the Ontario Bar Association, and a past elected member of the Ontario Bar Association Council (1993-1998). She is a current member of the Canadian Bar Association, the American Bar Association, the New York State Bar Association, the International Bar Association and the Canadian Tax Foundation, as well as an academician of The International Academy of Estate and Trust Law. She was elected a fellow of the American College of Trust and Estate Counsel in 1995. Margaret is also chair of the Queen's University gift planning advisory committee.

Margaret has been a frequent guest speaker, writer and conference chairperson for various professional organisations on the subject of trusts and estates, including for the Society of Trust and Estate Practitioners, the Canadian Bar Association, the Law Society of Upper Canada, the International Bar Association, the Canadian Tax Foundation and various private conference sponsors.

She has also written extensively in the areas of trusts, estate planning, estate administration and estate litigation with a particular focus on cross-border and multijurisdictional issues. She is past editor and contributor to the Ontario Bar Association's trusts and estates section newsletter. Margaret has authored two textbooks and developed the courses "Engineering of a Trust" and "Trust and Estate Management" for the Trust Institute of the Institute of Canadian Bankers. She is author of the Canada chapter in *International Succession Laws* (Tottel 2009), and a contributing author to *Widdifield on Executors and Trustees* (Carswell 2002), *The Private Wealth & Private Client Review* (Law Business Research 2018), *The International Comparative Legal Guide to: Private Client 2018* (Global Legal Group 2017), *Private Client Multi-jurisdictional Guide 2017/18* (Practical Law Company) and *Lexis Practice Advisor Canada* (LexisNexis).

WWL says: *The "excellent" Margaret O'Sullivan ranks as one of Canada's leading private client lawyers. Market sources report that "she is amazing" and that "her name stands out" among peers.*