

A professional portrait of Margaret O'Sullivan, a woman with shoulder-length blonde hair, wearing a dark blazer over a blue top, a pearl necklace, and pearl earrings. She is smiling slightly and looking towards the camera. The background is a blurred office setting with a window.

# Margaret O'Sullivan

**MANAGING PARTNER**

Location: Toronto, Ontario, Canada

Phone: 416-363-3700

Fax: 416-363-9570

Email: [mosullivan@osullivanlaw.com](mailto:mosullivan@osullivanlaw.com)



[Download vCard](#)

[Download Profile PDF](#)

## AREAS OF PRACTICE

- Estate Planning including High Net Worth and Cross Border and Multijurisdictional Succession
- Trust Planning
- Will Planning
- Incapacity Planning
- Trust and Estate Administration

- Advice to Executors and Trustees, Attorneys, Guardians and Legal Representatives
  - Estate Dispute Resolution
- 

## BAR ADMISSION

Ontario, 1983

---

## EDUCATION

**Queen's University, Faculty of Law**, Kingston, Ontario, Canada

- LL.B. - 1981

**Queen's University**, Faculty of Arts and Science, Kingston, Ontario, Canada

- B.A. *magna cum laude* 1978



Margaret O'Sullivan



Margaret R. O'Sullivan





---

[Testimonials](#) [Overview](#) [Awards And Accolades](#) [Professional Activities](#) [Presentations](#) [Publi](#)

---

## Testimonials

"She is a renowned expert in the field. She completely knows her stuff and has in-depth expertise in this area. She is highly professional, solution-oriented, calm and collected, and very precise. *She is very effective in her work, a true professional and her clients are always happy.*" Chambers High Net Worth 2019 Canada

---

"She find solutions, not problems." *Chambers Hight Net Worth Guide 2018*

---

"Expertise and technical skills are excellent" *Private Client Band 1, 2017 Chambers Canada*

---

"She provides all-round knowledge and always works towards the best solution for the client."  
*Who's Who Canada, Private Client 2016*

---

"Margaret O'Sullivan is recognised as one of the leading figures in the market on estate, will and trust planning and related litigation." *Who's Who Legal Canada 2017*

---

"Margaret O'Sullivan is extensively experienced handling complex trust and estate work for domestic and international private clients. She is particularly highly regarded for her expert knowledge of cross-border successions issues." *Who's Who Legal Canada, Private Client 2017*

---

Margaret O'Sullivan is "great with clients". She is one of the leading trust and estate lawyers in Canada. *Who's Who Legal Private Client 2016*

## Overview

Margaret's practice involves all aspects of trust and estate work for domestic and international private clients, including estate planning; will and trust planning; incapacity planning; estate litigation; advising executors, trustees and beneficiaries and administration of estates and trusts, with a focus on high net worth domestic, cross border and multijurisdictional succession issues. Margaret is recognized in The Best Lawyers in Canada 2019, Legal Week's Private Client Global Elite 2018, in the 2019 Edition of The Canadian Legal Lexpert Directory as one of the most frequently recommended estate planning lawyers, in The Who's Who Legal: Private Client 2018 and in The Who's Who Legal: Canada 2018 as one of the five leading trust and estate lawyers in Canada. She is one of the seven top-ranked Band 1 private client lawyers in Canada in Chambers High Net Worth Guide 2019. 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 an independent practice, Margaret was a partner in the Toronto office of the national Canadian law firm Stikeman Elliott where she directed the firm's trusts and estates practice. She has practiced exclusively in the area of trusts and estates since 1983.

## Awards and Accolades

- Recognized in the 2019 Edition of ***The Canadian Legal Lexpert Directory*** Most

Recommended Leading Practitioner in Estate Planning

- Recognized in ***The Best Lawyers in Canada 2019*** in Trusts and Estates
- Recognized in *Legal Week's Private Client Global Elite 2019*
- Ranked as one of the top seven Band 1 leading private wealth lawyers in Canada in ***Chambers High Net Worth 2019 Guide***
- Named one of the most highly regarded individuals in ***The Who's Who Legal: Canada 2019 (Private Client)***
- Recognized in ***The Who's Who Legal: Private Client 2019***
- Recipient of the 2014 **STEP Founder's Award for Outstanding Achievement**
- Recipient of the Ontario Bar Association's 2013 **Award of Excellence in Trusts and Estates Law**
- Awarded "**Volunteer of the Year**" by the **Society of Trust and Estate Practitioners (Canada) 2008**

## Professional Activities

- Chair of Program Committee for STEP Global Congress in Vancouver on September 13-14, 2018
- Founding member and a former Deputy Chair, Society of Trust and Estate Practitioners (Canada)
- Former Chair of the Editorial Board of its newsletter STEP INSIDE
- Past Deputy Chair and past member, Board of Directors and Council for STEP Worldwide
- Past Chair, Professional Standards Committee, STEP Worldwide
- Past Chair, Trusts and Estates Section of the Ontario Bar Association
- Past elected member, Ontario Bar Association Council, 1993-1998
- Academician of the International Academy of Estate and Trust Law
- Member, Canadian Bar Association
- Member, American Bar Association
- Member, New York State Bar Association
- Member, International Bar Association
- Member, Canadian Tax Foundation
- Elected Fellow of the American College of Trust and Estate Counsel, 1995
- Elected member, STEP Cross Border Estates Global Steering Committee, 2016
- Fellow, The American College of Trust and Estate Counsel (ACTEC)
- Chair of Queen's University Gift Planning Advisory Committee

## Presentations

## *Upcoming*

**Margaret is organizing and moderating a program on the topic Civil Law and Common law: A Comparison of Estate Administration On Death on October 10, 2019 for the STEP Cross Border Estates Special Interest Group which will be a live video conference with speakers in Toronto and London UK and attendees in both venues, as well as a webcast for attendees worldwide.**

**O'Sullivan Estate Lawyers is hosting a webinar on the topic Protecting a Child's Inheritance to be held on October 24, 2019**

**Margaret is Co-chairing and speaking at the STEP Cross-Border Estates program "Multiple Taxation on Death", London, U.K. on November 22, 2019**

## *Recent*

***Attending the annual conference of the International Academy of Estate and Trust Law, May 20–23, 2019 in Tokyo, Japan***

**Speaking at STEP International Tax and Estate Planning Forum: Around the Globe in Laguna Beach on May 9 and 10, 2019**

**Attending Global Legal Week Private Client Forum Americas 2019 at Newport Beach, CA on March 27–29.**

**Presenting to Faculty Leadership– Queen's University on January 28, 2019**

**Margaret attending Senior Trust and Estate Practitioners Forum on October 14–16, 2018**

**Margaret is speaking on Wills & Estate Planning Seminar at Pal Insurance Office on October 11, 2018.**

**Margaret is Chair of Program Committee for STEP Global Congress in Vancouver on September 13–14, 2018**

**Margaret speaking on Conflict of Laws issues as part of a panel discussion at STEP Annual Conference in Toronto on May 28–May 29, 2018.**

*The Lawyer's Daily, Wills, Trusts & Estates* "[Planning for succession of a cottage or vacation home: Getting personal](#)" **May 28, 2018**

**Margaret speaking at BloombergSen Women's event in Yorkville on May 1st, 2018.**

**Margaret speaking at Georgian Triangle Lifelong Learning in Collingwood on April 20, 2018.**

**Margaret attending American College of Trust and Estate Counsel Annual Meeting in San Antonio. Texas on March 8 – 11. 2018.**

-----, -----, -----  
**Co-chairing and speaking at STEP Cross-Border Estates– Mental & Incapacity Sessions in London, U.K. on November 30, 2017**

**Speaking at Estate Planning Breakfast Workshop at Pal Insurance on November 14, 2017**

**Attending American College of Trust and Estate Counsel, Nashville, October 12th–22nd, 2017**

**Cidel Provence Estate Planning Conference, September, 2017**

**STEP Canada 19th National Conference, "Discretionary Trusts – Practical Concerns", Toronto, June 12 – 13, 2017**

**Canada–U.S. Cross Border Estate Planning Issues, National Bank Toronto, June 7, 2017**

**STEP Toronto, "[\*Estate Planning for Global Families\*](#)", Toronto, April 12, 2017**

**Private Client Forum Americas, co-presenter: "Technologic: Technological liberation and the transparency of trust", Mayan Riviera, Mexico, February 15–17, 2017**

**Gluskin Sheff + Associates Inc., Private Client Lunch Seminar, February 9, 2017**

**2016 CBA Wills, Estates and Trusts Fundamentals for Estate Practitioners program, "Conflicts of Laws", Toronto, October 26, 2016**

**Canadian Tax Foundation, 2016 Ontario Tax Conference, Co-Presenter: "Multijurisdictional Estate Planning", Toronto, October 25, 2016**

**Law Society of Ontario Practice Gems: The Administration of Estates program, Presenter: "Issues Arising Where There Are Foreign Beneficiaries or Legal Representatives Of An Estate", Toronto, September 20, 2016**

**2016 STEP National Conference, Panel Presentation: "The Impact of the European Regulation on Succession in Canada", Toronto, June 10, 2016**

**CBA Wills, Estates and Trusts Fundamentals for Estate Practitioners program, "Conflict of Laws," Toronto, October 15–18, 2015**

**2015 Cidel Provence Conference, "Multijurisdictional Incapacity and Will Planning for the Mobile Client," Provence, France, September 2015**

**OBA Litigation and Administration of Foreign Trusts and Assets program, "Critical Guidance for the Planning and Administration of Foreign Assets," Toronto, April 9, 2015**

**Estate Planning & Litigation Forum, "Losing Your Marbles at Home and Abroad: Mental Incapacity and Multijurisdictional Planning," Langdon Hall, Cambridge, ON, April 28, 2015**



STEP Journal, Book Review of John Poyser's *Capacity and Undue Influence*, March 2015

Private Client Forum Americas 2015, "War Within: Mental Incapacity and Cross-Border Planning for Assets in Multiple Jurisdictions" (Panel Discussion), Papagayo Bay, Costa Rica, February 4-6, 2015

Knowledge Bureau Workshop, "Attorney School: Handling Financial Affairs for a Loved One," Toronto, November 29, 2014

STEP Global Congress 2014, "Multijurisdictional assets — challenges for estate planning and dealing with mental incapacity," Miami, Florida, November 6 & 7, 2014

## Publications

### *Recent*

*The Lawyer's Daily, Wills, Trusts & Estates* "[Powers of attorney and advanced care planning: Property](#)" on July 31, 2019. This article was originally published by The Lawyer's Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.

*The Lawyer's Daily, Wills, Trusts & Estates* "[Powers of attorney and advanced care planning: Disability](#)" on July 24, 2019. This article was originally published by The Lawyer's Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.

Margaret O'Sullivan, "[Age is only a number](#)" STEP Journal (Vol28 Iss5), June 2019

*The Lawyer's Daily, Wills, Trusts & Estates* "[Non-resident executors: From ancillary grants to foreign trusts](#)" May 27, 2019. This article was originally published by The Lawyer's Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.

*The Lawyer's Daily, Wills, Trusts & Estates* "[Non-resident executors and legal reps in estate law](#)" on May 16, 2019. This article was originally published by The Lawyer's Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.

*The Lawyer's Daily, Wills, Trusts & Estates* "[Foreign beneficiaries: From multiple taxation to transfer of interests](#) May 8, 2019. This article was originally published by The Lawyer's Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.

*The Lawyer's Daily, Wills, Trusts & Estates* "[Foreign beneficiaries: It's complicated](#)" April 29, 2019. This article was originally published by The Lawyer's Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.

Margaret O'Sullivan, '[Privacy v Transparency](#)', STEP Journal (Vol27 Iss3), p.26

*Globe and Mail* "[When kids squander money, parents are squarely to blame](#)" published on



[Cross-border will which has equalised money, parents are equally to blame](#) published on **January 14, 2019.**

*Law Times* "[Update on the European Succession Regulation – What Every Canadian with EU Connections Needs to Know](#)", **October 22, 2018.**

**[STEP Journal, Equity and equality are not the same thing, October 2018.](#)**

*Co-authored* [The Private Wealth & Private Client Review](#), 7th Edition, Chapter: "Canada" (Law Business Research, September 2018)

*The Lawyer's Daily, Wills, Trusts & Estates* "[Cross-border estate administration: The U.S.-Ontario mix](#)" **September 24, 2018. This article was originally published by The Lawyer's Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.**

*The Lawyer's Daily, Wills, Trusts & Estates* "[Cross-border estate administration: The two-country connection](#)" **September 11, 2018 This article was originally published by The Lawyer's Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.**

*The Lawyer's Daily, Wills, Trusts & Estates* "[Cross-border estate administration: U.S. beneficiaries](#)" **Aug 28, 2018**

*The Lawyer's Daily, Wills, Trusts & Estates* "[Cross-border estate administration: It's complicated](#)" **August 15, 2018 This article was originally published by The Lawyer's Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.**

**Margaret has been an expert columnist for [Advisor.ca](http://Advisor.ca) and Advisor's Edge magazine since 2011. You may read her columns [here](#).**

*The Lawyer's Daily, Wills, Trusts & Estates* "[Planning for succession of a cottage or vacation home: Matrimonial issues](#)" **June 13, 2018**

*The Lawyer's Daily, Wills, Trusts & Estates* "[Planning for succession of a cottage or vacation home: Consider the taxes](#)" **June 4, 2018**

**[STEP Journal, "Put the 'success' back into succession", May 2018.](#)**

**[Morningstar "Estate planning and charities: Know your options", May 14, 2018](#)**

**["Key Considerations in Multijurisdictional and Separate Situs Will Planning" Private Client Global Guide 2017](#)**

**["Private Client Law in Canada: Overview" Private Client Global Guide 2017](#)**

**[The International Comparative Legal Guide to: Private Client 2018 \(7th Edition\), Chapter 4: "Best Interest – Conflict of Interest: The Fiduciary Rule and Financial Advisory and Financial Planning Services" Global Legal Group, December 2017.](#)**

[Margaret O'Sullivan in \*The Private Wealth & Private Client Review\*, 6th edition, chapter 12: "Canada" \(Law Business Research, November 2017\)](#)

[STEP Journal, Money Talks, October 2017](#)

[\*Best interests or conflict of interest?\*, June, 2017](#)

[Law Times \(Family Law and Trust Law focus\), "Confidentiality Matters: Thoughts on Death and Privacy" February 27, 2017](#)

[\*The International Comparative Legal Guide to: Private Client 2017\* \(6th Edition\), Chapter 4: "Special Issues Arising for Estates with Foreign Beneficiaries or Legal Representatives"](#)

Global Legal Group, December 2016

[STEP Journal Volume 24/issue 9, Confidential Matters, November 2016](#)

[\*Practical Law Global Guide: Private Client\* \(online\), "Private client law in Canada: Overview", Thomson Reuters \(updated November 2016\)](#)

[\*Practical Law Global Guide: Private Client\* \(online\), "Key Considerations in Multijurisdictional and Separate Situs Will Planning", Thomson Reuters \(updated November 2016\)](#)

Margaret O'Sullivan in *The Private Wealth & Private Client Review*, 5th edition, chapter: "Canada" (Law Business Research, October 2016)

[Law Times \(Family Law and Trust Law focus\), "Family Law and the Treatment of Discretionary Trust Interests on Marital Breakdown" February 22, 2016](#)

[\*The International Comparative Legal Guide to: Private Client 2016\* \(5th Edition\), Chapter 4: "The European Union Succession Regulation Now in Effect - How it Impacts Planning,"](#)

Global Legal Group, December 2015

[\*Estates, Trusts & Pensions Journal\*, "Conflict of Laws Issues in Drafting and Using Powers of Attorney for the Mobile Client", volume 35, December 2015](#)

[Law Times \(Estates & Trust Law focus\), "How New EU Rules for Cross-Border Succession Apply to Canadians," October 26, 2015](#)

Margaret O'Sullivan in *The Private Wealth & Private Client Review*, 4th edition, chapter: "[Canada](#)" (Law Business Research, October 2015)

[Book Review: \*The International Protection of Adults\*, eds R. Frimston et al., STEP TQR: Volume 13/Issue 3, 2015](#)

The International Comparative Legal Guide to: Private Client 2015 (4th Edition), Chapter 4: "[When Trust Law Meets Family Law: A Comparative Review of Discretionary Trusts and Marital Property Division](#)," Global Legal Group, December 2014

*The Private Wealth & Private Client Review*, 3rd edition, chapter: "[Canada](#)" (Law Business Research, October 2014)

## Contact Us For An Appointment

SEND US AN EMAIL ▸



© 2019 by [O'Sullivan Estate Lawyers LLP](#). All rights reserved.

[Disclaimer](#) | [Site Map](#) | [Privacy Policy](#) | [Business](#)

[Development Solutions](#) by [FindLaw](#), part of Thomson

Reuters.

TD Bank Tower Toronto-Dominion Centre 66  
Wellington Street West, Suite 3430 P.O. Box 68  
Toronto, ON M5K 1E7

### CONTACT INFORMATION

Toll Free: 888-365-6235

Phone: 416-363-3336

Fax: 416-363-9570

[Request An Appointment](#)

[Toronto Law Office Map](#)

[Barrier-free Accessibility Directions](#)

SCROLL TO **THE TOP**