

A professional headshot 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 outdoor setting with a wooden chair.

# Margaret O'Sullivan

## MANAGING PARTNER

Location: Toronto, Ontario, Canada

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### 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

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## BAR ADMISSION

Ontario, 1983

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## 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

Family dynamics: Top Ten Wills, Trusts and Estates



Margaret O'Sullivan



Margaret R. O'Sullivan





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## 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*

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

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"Expertise and technical skills are excellent" *Chambers Canada 2017*

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

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"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*

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"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 succession issues." *Who's Who Legal Canada, Private Client 2017*

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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 2019*, 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 2019* and in *The Who's Who Legal: Canada 2019*. She is one of 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 Practitioners in Estate Planning
- Recognized in ***The Best Lawyers in Canada 2019*** in Trusts and Estates
- Member of *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, Vancouver, September 13-14, 2018
- Past Deputy Chair and past member, Board of Directors and Council for STEP Worldwide
- Past Chair, Professional Standards Committee, STEP Worldwide
- Founding member and former Deputy Chair, Society of Trust and Estate Practitioners (Canada)
- Former Chair of the Editorial Board of its newsletter STEP INSIDE
- 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
- Elected member, STEP Cross Border Estates Global Steering Committee, 2016
- Fellow, The American College of Trust and Estate Counsel (ACTEC)
- Member, Canadian Bar Association
- Member, American Bar Association
- Member, New York State Bar Association
- Member, International Bar Association
- Member, Canadian Tax Foundation
- Chair of Queen's University Gift Planning Advisory Committee

## Presentations

*Upcoming*

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

*Recent*

**Attended the annual conference of the International Academy of Estate and Trust Law, May 20-23, 2019, Tokyo, Japan**

**"Recent Canadian Estate Planning Developments" STEP International Tax and Estate Planning Forum: Around the Globe, Laguna Beach, CA May 9 and 10, 2019**

**Speaking on recent "Canadian Estate Planning Developments" Global Legal Week Private Client Forum Americas 2019, Newport Beach, CA March 27-29.**

**Presentation to Faculty Leadership on "Gift planning on Death"- Queen's University, Kingston January 28, 2019**

**Attended Senior Trust and Estate Practitioners Forum October 14-16, 2018**

**Wills & Estate Planning Seminar, Pal Insurance, October 11, 2018.**

**Chair, Program Committee, STEP Global Congress, Vancouver September 13-14, 2018**

**Conflict of Laws, STEP Annual Conference, Toronto, May 28-May 29, 2018.**

**Contingency planning on Death, BloombergSen Women's event, May 1st, 2018.**

**Key Estate planning issues, Georgian Triangle Lifelong Learning, Collingwood, April 20, 2018.**

**Attended American College of Trust and Estate Counsel Annual Meeting, San Antonio, Texas, March 8 - 11, 2018.**

**Co-chair and presenter, STEP Cross-Border Estates- Mental & Incapacity Session, London, U.K., November 30, 2017**

**Presenter, Estate Planning Breakfast Workshop, Pal Insurance, November 14, 2017**

**Attended American College of Trust and Estate Counsel Fall Meeting, Nashville, October 12th-22nd, 2017**

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

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

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

***"Estate Planning for Global Families", STEP 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, Ontario, 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

*STEP Journal*, ['The Psychology of Wealth'](#), October 2019.

*The Lawyer's Daily, Wills, Trusts & Estates* "[Powers of attorney and advanced care planning: Assisted dying](#)" on October 3, 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: Wish list](#)" on September 25, 2019. This article was originally published by The Lawyer's Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.

*Co-author The Private Wealth & Private Client Review, 8th Edition, Chapter: "[Canada](#)" (Law Business Research, September 2019)*

*The Lawyer's Daily, Wills, Trusts & Estates* "[Powers of attorney and advanced care planning: Wishes and directives](#)" on September 4, 2019. This article was originally published by The Lawyer's Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.

*Practical Law Global Guide: Private Client, "[Private Client Law in Canada: Overview](#)"*, Thomson Reuters (updated August 2019)

*Practical Law Global Guide: Private Client, "[Key Considerations in Multijurisdictional and Separate Situs Will Planning](#)"*, Thomson Reuters (updated August 2019)

*Lawyer's Daily, Wills, Trusts & Estates* "[Powers of attorney and advanced care planning: Substitute decision making](#)" on August 20, 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: Personal care](#)" on August 12, 2019. This article was originally published by The Lawyer's Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.

*Lawyer's Daily, Wills, Trusts & Estates* "[Powers of attorney and advanced care planning: Revocation and alternatives](#)" on August 6, 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: 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 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-author [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

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

*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)

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