

Marly Peikes
ASSOCIATE LAWYER

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Overview

Marly's practice includes all aspects of estate and trust planning, estate administration and estate dispute resolution.

Marly focuses on assisting clients in organizing their financial affairs during their lifetime through creative estate planning strategies which balance each client's unique needs with corresponding estate administration tax and income tax considerations, all while ensuring that each client's objectives are achieved and optimized.

Marly works with clients and their financial advisors, accountants, and other professionals to provide customized legal solutions and to generate and implement estate plans and, in the context of estate administration, to achieve a smooth and efficient estate and trust administration.

Marly is currently completing the Diploma Program of the Society of Trust and Estate Practitioners (STEP).

BAR ADMISSIONS

Ontario, 2018

EDUCATION

- **University of Toronto**, Faculty of Law, Toronto, Ontario
J.D. – 2017 (Received standing of distinction in 2015/2016)
- **McGill University**, Montreal, Quebec, Canada
B.A. – 2013 (Graduated with distinction)

Prior to joining O’Sullivan Estate Lawyers LLP as an associate lawyer, Marly articulated and practiced at a mid-sized Toronto law firm where she focused on succession planning for clients, including business succession, estate planning and estate freezes.



Professional Activities

- Member, Ontario Bar Association
- Member, Canadian Bar Association
- Student Member, Society of Trust and Estate Practitioners
- Member, Junior Trusts and Estates Practitioners
- Chair Emeritus, Save a Child’s Heart Canada Young Professional Board
- Member, Planned Giving Committee of Save a Child’s Heart Canada

Presentations

- Marly and the O’Sullivan team hosted a webinar for trust officers in collaboration with Estate Research in the U.K., “**Complex, High Value Trust and Estate Administration: Perils and Pitfalls,**” on May 19, 2021.

Specific topics will included: 1) Gathering in foreign assets; 2) Liability and income tax matters; and 3) Private corporation interests in an estate or trust.

- Marly and the O’Sullivan team hosted a private webinar for advisors and clients of **Scotia Private Wealth Management**, “Foreign Property and Connections: It’s Complicated,” on February 18, 2021.
- Marly and the O’Sullivan team hosted a webinar, “**Using Multijurisdictional Wills and Powers of Attorney,**” on January 20, 2021, in conjunction with Chambers and Partners. Registrants spanned 43 countries around the world.
- Marly and the O’Sullivan team of estate lawyers hosted a webinar, “**Planning and Administering an Estate with Foreign Connections,**” in conjunction with Key Media, publishers of Canadian Lawyer magazine and The Law Times, on September 23, 2020.
- Speaker for the **OBA Make a Will Month at the Eglinton Square library** on November 12, 2019.

Publications

- The Lawyer's Daily, Wills, Trusts, and Estates, [Estate Planning Around U.S. Citizenship: Step One. Confirm Status](#), May 6, 2021.
- Ontario Bar Association Newsletter, [Barsoski v Wesley: Case Comment](#) (Uncertain language in a will can have a major impact on the beneficiaries of an estate), March 2021.
- The Lawyer's Daily, Wills, Trusts & Estates [European 'forced heirship' in estate planning: A case study](#), on February 5, 2021. This article was originally published by The Lawyer's Daily (www.thelawyersdaily.ca), part of LexisNexis Canada Inc.
- The Lawyer's Daily, Wills, Trusts & Estates [Avoiding the tax bill on U.S. securities](#), on October 8, 2020. This article was originally published by The Lawyer's Daily (www.thelawyersdaily.ca), part of LexisNexis Canada Inc.
- Lexology, "[What are the key tax considerations for private clients in Canada?](#)" co-authored with Margaret O'Sullivan, September 7, 2020. This article was excerpted from the longer version, originally published by [The Law Reviews](#), in 2020.
- OBA Trusts and Estates newsletter, "[Zhang Hong Li and others v DBS Bank \(Hong Kong\) Ltd.: Case Comment](#)", May 04, 2020.
- **Money & Family Law**, "[Heads up to Cross Border Probate](#)", Thomson Reuters Canada Limited, December 2019, Issue 34-12, p. 95.
- OBA Trusts and Estates newsletter, "[Mutual Wills: How They Are Created and When a Constructive Trust Will be Imposed](#)", October 07, 2019.

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