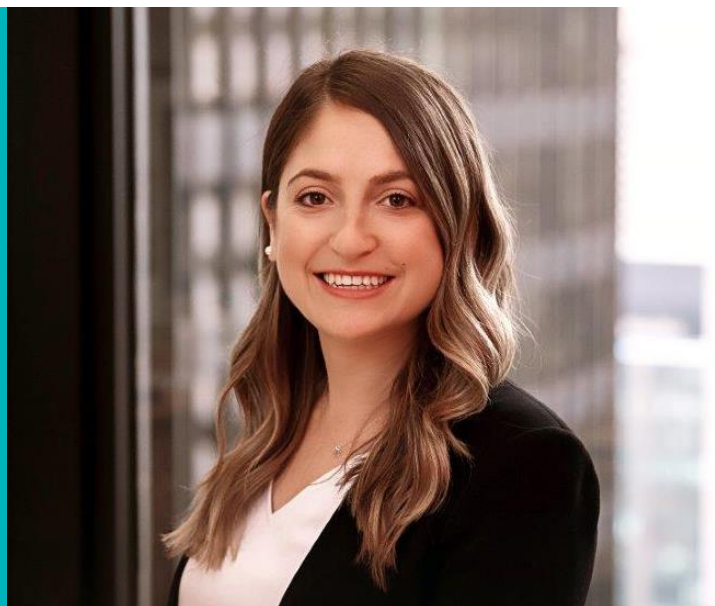


## Marly Peikes

PARTNER

Toronto, Ontario, Canada  
P 416-363-7501  
F 416-363-9570  
[mpeikes@osullivanlaw.com](mailto:mpeikes@osullivanlaw.com)

[LinkedIn](#) | [Download vCard](#)



## 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 minimization 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 including those with challenging cross-border and multijurisdictional issues and, in the context of estate administration, to achieve a smooth and efficient estate and trust administration.

Marly was promoted to partner in January 2022.

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### AREAS OF PRACTICE

- Estate Planning
- Trust Planning
- Will Planning
- Cross-border and Multijurisdictional Estate Planning
- Trust and Estate Administration
- Incapacity Planning
- Advice to Executors and Trustees, Attorneys, Guardians and Legal Representatives

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

Prior to joining O’Sullivan Estate Lawyers LLP, 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 (OBA)
- Member, Canadian Bar Association (CBA)
- Student Member, Society of Trust and Estate Practitioners (STEP)
- Member, Junior Trusts and Estates Practitioners
- Member, Jewish Foundation of Greater Toronto Professional Advisory Committee
- Member, Planned Giving Committee of Save a Child’s Heart Canada

## Presentations

### Upcoming

### Recent

- Marly spoke on the topic “**Practical Advice for Tackling Challenging Planning Issues**” at “Wills and Estate Planning: A Primer,” organized by the Ontario Bar Association (OBA). Attendance was both in-person and online, on September 15, 2022.
- Marly with the O’Sullivan Team hosted a webinar for readers of international legal publication Mondaq, on the topic “**It’s Complicated: Solutions for Planning and Administering an Estate with Foreign Connections**” on March 24, 2022.
- Marly with 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 included: 1) Gathering in foreign assets; 2) Liability and income tax matters; and 3) Private corporation interests in an estate or trust.

- Marly with 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 with the O’Sullivan team 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

- Marly Peikes and Margaret O’Sullivan are co-authors of the 40-page Canada Chapter, of “**Private Wealth and Private Client Review 2022**,” 11th Edition, published by The Law Reviews, in late October 2022.
- The Lawyer’s Daily, Wills, Trusts & Estates, “**The estate documents are signed, now what?**” on October 3, 2022. This article was originally published by The Lawyer’s Daily ([thelawyersdaily.ca](http://thelawyersdaily.ca)), part of LexisNexis Canada Inc.
- Marly was quoted in an article, “**Disinheriting a child easier in some provinces than others**,” in the online publication Advisor.ca for Canada’s financial advisors on September 13, 2022.
- The Lawyer’s Daily, Wills, Trusts & Estates, “**Becoming a non-resident with TFSA, RRSP accounts**,” on August 8, 2022. This article was originally published by The Lawyer’s Daily ([thelawyersdaily.ca](http://thelawyersdaily.ca)), part of LexisNexis Canada Inc.
- The Lawyer’s Daily, Wills, Trusts & Estates, “**The uncertainty of beneficiary designations**,” on June 2, 2022. This article was originally published by The Lawyer’s Daily ([thelawyersdaily.ca](http://thelawyersdaily.ca)), part of LexisNexis Canada Inc.
- Marly’s article “Death and Taxes: Executor’s Compliance Responsibilities,” was re-published with permission in “Money and Family Law,” a Thomson Reuters publication, in June 2022.
- The Lawyer’s Daily, Wills, Trusts & Estates, “**Being charitable across borders**,” on April 22, 2022. This article was originally published by The Lawyer’s Daily ([thelawyersdaily.ca](http://thelawyersdaily.ca)), part of LexisNexis Canada Inc.

- The Lawyer’s Daily, Wills, Trusts & Estates, “**Death and taxes: Executor’s compliance responsibilities,**” on February 23, 2022. This article was originally published by The Lawyer’s Daily ([thelawyersdaily.ca](http://thelawyersdaily.ca)), part of LexisNexis Canada Inc.
- **Marly’s promotion to partner** was published in The Lawyer’s Daily on January 27, 2022.
- The Lawyer’s Daily, Wills, Trusts, and Estates, “**Intestacy: Update on Preferential share and common law spouses,**” on January 4, 2022. This article was originally published by The Lawyer’s Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.
- Canada Chapter – “**Private Wealth and Private Client Review 2021,**” – Marly Peikes along with Managing Partner, Margaret O’Sullivan, has contributed the Canada Chapter for “Private Wealth and Private Client Review.”
- The Lawyer’s Daily, Wills, Trusts, and Estates, “**Smart giving: Charitable gifts under your will,**” on October 8, 2021. 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, and Estates, “**Domestic contracts across borders,**” on September 1, 2021. This article was originally published by The Lawyer’s Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.
- Leith Wheeler Client Newsletter, “**Four Ways of Charitable Giving,**” Summer 2021.
- The Lawyer’s Daily, Wills, Trusts, and Estates, “**Estate Planning Around U.S. Citizenship: Step One, Confirm Status,**” May 6, 2021. This article was originally published by The Lawyer’s Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.
- Giving Advice, Jewish Foundation of Greater Toronto, “**Canadians with European Connections: A Case Study,**” Spring 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](http://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](http://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 4, 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 7, 2019.
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### **O’Sullivan Estate Lawyers LLP**

66 Wellington Street West, Suite 3430, P.O. Box 68, Toronto, ON M5K 1E7 Canada

[www.osullivanlaw.com](http://www.osullivanlaw.com)

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