

## Stephanie Battista

ASSOCIATE LAWYER

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## Overview

Stephanie practices exclusively in estate and trust law, focusing on all aspects of estate planning and estate administration in order to provide clients with sound and helpful legal advice.

Stephanie regularly advises clients on their succession plan including wills, trusts, powers of attorney and domestic contracts. Her clients range from blended families, business owners, medical professionals, high net worth clients and young couples. Stephanie works closely with clients and their professional team to develop custom plans based on each client's specific needs and objectives while ensuring tax minimization.

Stephanie also advises executors, trustees, and attorneys on their duties and obligations, and provides guidance through the complexities of the estate administration process as well as estate and trust accounting, where needed or appropriate.

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

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### AREAS OF PRACTICE

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

### BAR ADMISSIONS

Ontario, 2014

### EDUCATION

- **Queen's University**, Faculty of Law, Kingston, Ontario, Canada  
J.D. - 2013
- **McMaster University**, Hamilton, Ontario, Canada  
B.A. (Hons.) - 2008 (Dean's Honour List in 2007 and 2008)

Prior to joining O’Sullivan Estate Lawyers LLP, Stephanie articulated and practiced trusts and estates law at a boutique law firm.

## Professional Activities

- Member, Ontario Bar Association
- Member, Toronto Lawyers Association
- Student Member, Society of Trust and Estate Practitioners
- Member, Junior Trusts and Estates Practitioners

## Presentations

### Upcoming

- Stephanie and Margaret O’Sullivan will speak on the topic “**The Importance of Keeping Your Affairs in Order**,” a private event for clients of Cumberland Private Wealth Management Inc., on July 21, 2021.

### Recent

- Stephanie and the O’Sullivan Team hosted a webinar on the topic “**Complex, High Value Estate and Trust Administration: Perils and Pitfalls**,” for trust officers across Canada, in conjunction with Estate Research, a genealogy search firm in the U.K., on May 19, 2021.

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

- Stephanie 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.
- Stephanie 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.
- Stephanie 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.

## Publications

## Recent

- The Lawyer’s Daily, Wills, Trusts & Estates “[European ‘forced heirship’ in estate planning: a case study,](#)” on February 5, 2021. While testamentary freedom — the autonomy to pass property on death as a person pleases — is a long-standing principle in Canada, most civil law jurisdictions in the European Union (EU) operate under a forced heirship regime.
  - The Lawyer’s Daily, Wills, Trusts & Estates “[We’re moving to Canada: Leaving assets abroad,](#)” on October 13, 2020. 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 “[When you don’t trust a beneficiary, use a trust,](#)” on September 4, 2020. This article was originally published by The Lawyer’s Daily ([www.thelawyersdaily.ca](http://www.thelawyersdaily.ca)), part of LexisNexis Canada Inc.
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## Contact Us For An Appointment ›

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