

Stephanie Battista

PARTNER

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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 and entrepreneurs, medical professionals, high net worth clients and young couples, and those with complex cross-border and multijurisdictional issues and needs.

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 including where

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, 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)

there are cross-border and multijurisdictional estate challenges, as well as estate and trust accounting, where needed or appropriate.

Stephanie was promoted to partner in January 2022.

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

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 (OBA)
- Member, Toronto Lawyers Association (TLA)
- Student Member, Society of Trust and Estate Practitioners (STEP)
- Member, Junior Trusts and Estates Practitioners

Presentations

Upcoming

- Stephanie with the O’Sullivan Team will host a webinar to readers of international legal publication Mondaq on March 24, 2022.

Recent

- Stephanie spoke on **“Jointly Held Assets”** during [Administration of Estates](#), a Continuing Professional Development (CPD) event organized by the Law Society of Ontario (LSO), aimed at estate lawyers on September 23, 2021. The program was co-chaired by Susannah Roth, a partner at O’Sullivan Estate Lawyers.
- Stephanie and Margaret O’Sullivan spoke 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.
- Stephanie with 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 included: 1) Gathering in

foreign assets; 2) Liability and income tax matters; and 3) Private corporation interests in an estate or trust.

- Stephanie with 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 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.
- Stephanie 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.

Publications

Recent

- **Stephanie’s promotion to partner** was published in The Lawyer’s Daily on January 27, 2022.
- The Lawyer’s Daily, Wills, Trusts & Estates, “**Using language to make wills more inclusive,**” on November 18, 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, “**Should I stay or should I go: When to decline acting as executor,**” on September 27, 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, “**First create a will, then keep it updated,**” on July 20, 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, “**The benefits of choosing an executor who’s a team player,**” on May 31, 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, “**Resulting trusts can cause more estate problems than they solve,**” on April 20, 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, “**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, “[We’re moving to Canada: Leaving assets abroad](#),” on October 14, 2020. 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, “[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), part of LexisNexis Canada Inc.
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