

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 holds the Trust and Estate Practitioner (TEP, 2022) designations from the Society of Trust and Estate Practitioners (STEP). In addition, Stephanie achieved the highest mark in Canada on STEP's 2021 Wills, Trusts & Estate Administration exam.

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

Recent

- Stephanie and the O'Sullivan team hosted an international webinar for members of Mondaq on **"Navigating the Cross-Border Highway: A Roadmap for Canada-U.S. Estate Planning and Administration,"** on Thursday, March 23, 2023.
- Stephanie Battista spoke on **"Wills, Estates and Powers of Attorney"** at the Association of Law Officers of the Crown (ALOC)/ Government of Ontario Educational Conference, in Niagara Falls, Ontario, on November 7, 2022.
- Stephanie 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.

- 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

- LAW360, Wills, Trusts & Estates, **“Sentimental value: Dealing with personal effects in estate law,”** on April 19, 2023. This article was originally published by **LAW360**, part of LexisNexis.
- LAW360, Wills, Trusts & Estates, **“No power of attorney? Here’s what happens,”** on March 10, 2023. This article was originally published by **LAW360**, part of LexisNexis.
- LAW360, Wills, Trusts & Estates, **“Parents: Make sure they have a good estate plan,”** on January 6, 2023. This article was originally published by **LAW360**, part of LexisNexis.
- LAW360, Wills, Trusts & Estates, **“Recognition: Canadian documents, foreign jurisdiction,”** on October 28, 2022. This article was originally published by **LAW360**, part of LexisNexis.

- The Lawyer’s Daily, Wills, Trusts & Estates, “**The trustee as genie: A letter of wishes,**” on September 1, 2022. This article was originally published by The Lawyer’s Daily (thelawyersdaily.ca), part of LexisNexis Canada Inc.
- Stephanie was quoted in an article, “**How does property ownership work in common law relationships?**” by James Battison in Moneywise Magazine, on July 28, 2022. “I think sometimes people are under the mistaken belief that not being married makes things simpler,” says Stephanie Battista, partner at O’Sullivan Estate Lawyers. “But that’s actually not the case.”
- The Lawyer’s Daily, Wills, Trusts & Estates, “**Estate planning with joint assets: Think of your executor,**” on July 13, 2022. This article was originally published by The Lawyer’s Daily (thelawyersdaily.ca), part of LexisNexis Canada Inc.
- The Lawyer’s Daily, Wills, Trusts & Estates, “**Make sure you have it before you give it,**” on May 13, 2022. This article was originally published by The Lawyer’s Daily (thelawyersdaily.ca), part of LexisNexis Canada Inc.
- The Lawyer’s Daily, Wills, Trusts & Estates, “**Little orphan assets: Making a list, checking it twice,**” on March 22, 2022. This article was originally published by The Lawyer’s Daily (thelawyersdaily.ca), part of LexisNexis Canada Inc.
- **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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