

# O'SULLIVAN

ESTATE LAWYERS

EXCELLENCE

CUSTOMIZED  
SOLUTIONS

HIGH-TOUCH  
SERVICE

## Our Philosophy

Each client is unique. We believe the key to achieving your individual estate planning goals is understanding your personal objectives and values. O'Sullivan Estate Lawyers provides a comfortable atmosphere where the intricacies of your finances and family relationships may be discussed frankly and with discretion.

The solutions we provide, whether simple or sophisticated, are presented in a straight forward manner and carried out cost-effectively. We provide a level of personal service not achievable in large institutional or transaction-oriented law firms.

Our in-depth private client expertise includes estate planning and will, trust and incapacity planning. We act in the administration of trusts and estates and regularly advise executors and trustees in carrying out their responsibilities. We are well recognized for our special expertise in dealing with complex cross-border and multijurisdictional planning and administration matters.

We have expertise in estate dispute resolution and court applications, including representing executors, trustees and beneficiaries, and passing estate and trust accounts, seeking court directions and guardianship applications. We also provide independent legal opinions on trust and estate matters.

## Who We Are

O'Sullivan Estate Lawyers is widely recognized as one of Canada's premier trust and estate practices.

The firm received the award for Boutique Firm of the Year by the Society of Trust and Estate Practitioners (STEP) in London, UK, in 2019 and was recognized in 2021-2022 as one of Canada's top ten Wills, Trusts and Estates Boutiques by Canadian Lawyer Magazine.

We regularly advise Canada's high net worth individuals and families as well as those who live outside Canada who need Canadian and Ontario trust and estate advice. We are known for our expertise in dealing with complex trust and estate matters, in particular advising international families on cross-border Canada-US and multijurisdictional succession planning and estate and trust administration.

Our thought leadership is well recognized by our blog which has 2,000 subscribers and has been consistently published bimonthly for more than 10 years, as well as by our book [Trust and Estate Essentials: Achieving Success in Family Succession](#).

We are frequent speakers and writers at professional conferences and for a number of publications. Margaret O'Sullivan and colleagues author the Canada Chapter for each of the publications *International Succession Laws*, *Private Wealth and Private Client Review and Practical Law*.

[Margaret O'Sullivan](#) has consistently received the top Band 1 ranking for Private Wealth Law, including for 2021, as one of Canada's top trust and estate lawyers and thought leaders, and [Susannah Roth](#) has been ranked Band 3, in the prestigious [Chambers High Net Worth Guide](#).

Margaret is also a member of [Legal Week's Private Client Global Elite 2022-23](#) which recognizes the top 250 private client lawyers worldwide. She is also recognized as one of Canada's top trust and estate lawyers by [Who's Who Legal: Private Client 2021](#).

The firm, Margaret O'Sullivan, and Susannah Roth are all recognized by The Best Lawyers in Canada 2022, and by the [Canadian Legal Lexpert Directory 2022](#) as leading trust and estate practitioners.

2021-22 Canada's Top 10  
Wills, Trusts & Estates  
Boutique Selected by  
*Canadian Lawyer Magazine*



## Private Client Services

- Estate Planning
- Will and Trust Planning
- Multijurisdictional Will and Incapacity Planning
- Incapacity Planning including Powers of Attorney
- Trust and Estate Administration
- Cross-Border and Multijurisdictional Trust and Estate Administration
- Advice to Executors, Trustees and Beneficiaries
- Estate and Trust Dispute Resolution and Court Applications
- Legal Opinion Work

## Exceptional solutions. Your needs are as unique as you.

### Planning Solutions for Individuals and Families

From complex will and trust planning to incapacity planning and domestic contracts, our lawyers can help you find effective solutions for your estate planning needs. We will help you understand your options and develop an estate plan that meets your objectives and the needs of your family into the future, including tax-planned wills and trusts.

We will assist you if you have challenging issues, such as family members with special needs, a blended family, or family dissension in order to provide wealth solutions.

We also advise on charitable giving and the establishment of private foundations. As well, we advise on domestic contracts including situations involving trust interests and high value complex assets.

### Administration of Trusts and Estates

The administration of an estate or trust can be confusing and overwhelming. We can assist you to administer an ongoing trust, or an estate following the loss of a relative or other loved one, or for an incapable person. From guiding you through the initial steps, to obtaining probate of a will where necessary, to distribution of assets to beneficiaries, and final windup and establishment and administration of any continuing trusts, we can provide our experience and know-how.

We can also assist you as an executor, trustee, guardian or attorney in obtaining approval of your administration, including preparing accounts for court approval where advisable.

### Navigating Cross-Border and Multijurisdictional Estate Matters

If your trust and estate matter involves assets, beneficiaries, executors, trustees or other representatives in another jurisdiction, we can provide solid legal direction.

We are well known in the trust and estate profession for complex high-net-worth planning, including multiple will planning for assets in different jurisdictions and separate situs powers of attorney. We can also assist in estate and trust administration for foreign assets with a multijurisdictional and cross-border connection.

Many of our mandates involve advising clients with legally significant ties to more than one jurisdiction, including the U.S., the U.K and many European Union countries.

## Estate and Trust Dispute Resolution and Court Applications

When matters become contentious, we can assist you in finding common ground and in negotiating and resolving estate and trust disputes. Court applications can be necessary in trust and estate matters, whether to vary a trust, apply to court for advice and directions, or seek guardianship for a family member, for which we can provide our expertise and experience.

## Firm Information

For more information about the firm, please visit our website at [www.osullivanlaw.com](http://www.osullivanlaw.com) where you will find a wealth of information, including our library of [Advisory Letters](#) on a broad range of trust and estate topics as well as our [archive of blogs](#). We also publish [Case Studies](#).

O'Sullivan Estate Lawyers are regularly sought by journalists, editors, as well as TV and radio producers for their thought leadership, opinions and analysis of important and topical trust and estate issues which impact families in wealth succession and planning. Read our "[In the Media](#)" section.



TD Bank Tower, Toronto-Dominion Centre  
66 Wellington Street West, Suite 3430, P.O. Box 68 Toronto, ON M5K 1E7

## Your Trust and Estate Legal Team



### **Margaret O'Sullivan**

#### **Firm Founder and Managing Partner**

Margaret works with high net worth individuals and families in Ontario, across Canada and globally. Margaret focuses on providing effective solutions to clients with complex will, trust and estate needs, including individuals and families with property in, or connections to, multiple jurisdictions. She is recognized both nationally and internationally for her expertise in the areas of estate planning, will and trust planning, incapacity planning and estate dispute resolution.

**T 416-363-3700**

**E [mosullivan@osullivanlaw.com](mailto:mosullivan@osullivanlaw.com)**



### **Susannah Roth**

#### **Partner**

Susannah has focused exclusively on trust and estate law since her call to the bar in 2002. She deals with a variety of complex trust and estate matters, with a focus on estate and trust administration and guardianship including cross-border and multijurisdictional administration. She has been a long standing leader at the Bar, including as a past Chair of the Trusts and Estates Section of the Ontario Bar Association and Trustee of the OBA Foundation.

**T 416-363-6669**

**E [sroth@osullivanlaw.com](mailto:sroth@osullivanlaw.com)**



### **Stephanie Battista**

#### **Partner**

Stephanie regularly advises clients on their succession plan including wills, trusts, powers of attorney, and domestic contracts, and cross-border and multijurisdictional matters. 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 and provides guidance through the complexities of the estate administration process as well as estate and trust accounting.

**T 416-363-6020**

**E [sbattista@osullivanlaw.com](mailto:sbattista@osullivanlaw.com)**



### **Marly Peikes**

#### **Partner**

Marly focuses on estate planning and estate administration, including cross-border and Canada-U.S. matters, as well as estate dispute resolution to ensure each client's objectives are achieved. She advises executors and trustees on how to achieve a smooth and efficient estate and trust administration and avoid problems and pitfalls.

**T 416-363-7501**

**E [mpeikes@osullivanlaw.com](mailto:mpeikes@osullivanlaw.com)**

## Your Trust and Estate Legal Team



### **Joanne Field**

#### **Senior Law Clerk**

Joanne Field has practiced as an estates law clerk since 1997. Joanne has over 25 years of experience working with major nationally based Toronto law firms. Joanne has a broad range of experience, including preparation of complex estate planning documents, estate administration and estate litigation, including mediation, trial and appellate work.

**T** 416-363-3151

**E** [jfield@osullivanlaw.com](mailto:jfield@osullivanlaw.com)



### **Shannon O'Connor**

#### **Law Clerk/Coordinator - Office Administration**

Shannon assists executors and trustees in estate administration, including court applications. Shannon is also responsible for a variety of administrative functions, including billings and accounts to ensure the smooth and efficient operation of the firm. She's always ready to respond to any queries you may have in a helpful and responsive way.

**T** 416-363-8107

**E** [soconnor@osullivanlaw.com](mailto:soconnor@osullivanlaw.com)



### **Jana Schilder**

#### **Marketing and Public Relations**

Jana is responsible for the firm's marketing, including social media presence, website and public relations, as well as supporting the firm's lawyers in providing continuing professional development to the legal profession and other audiences. She works closely with our clients to ensure they receive information on current legal developments, including the firm's blog and advisories. Jana has extensive experience in law firm marketing, including directing the marketing initiatives of a major national Canadian law firm.

**T** 416-831-9154

**E** [jschilder@osullivanlaw.com](mailto:jschilder@osullivanlaw.com)

## Your Trust and Estate Legal Team



### Sherry Guo

#### Business and Operations Manager

Sherry is a CPA and has oversight over the firm's business processes and operations. Prior to joining the firm, she held senior finance and operations positions with two large downtown Toronto law firms. Sherry has more than 20 years of finance and operational experience in various industries and sectors. She has a "can do" entrepreneurial spirit, a dedicated client-driven focus, as well as an innate ability to "hit the ground running" in order to maximize the firm's organizational capabilities and operations, to achieve superior results.

**T** 416-363-8842

**E** [sguo@osullivanlaw.com](mailto:sguo@osullivanlaw.com)



### Nancy Zolezzi

#### Legal Administrative Assistant

Nancy provides strong administrative support for the firm and handles a variety of duties and daily operations. Nancy has more than 10 years of experience working in law firms, including in the area of trusts and estates. She brings a calm, positive attitude creating a friendly work environment and superior technical skills to help ensure the practice runs efficiently and smoothly.

**T** 416-363-4783

**E** [nzolezzi@osullivanlaw.com](mailto:nzolezzi@osullivanlaw.com)



### Tainisha Goulding

#### Legal Administrative Assistant

Tainisha provides administrative and legal support in executing the firm's operational and administrative functions. Tainisha is a diligent professional with more than 10 years of experience in Legal Administration. She is always eager and ready to help to get work completed promptly and efficiently. As a critical and logical thinker with excellent organizational skills, she brings an optimistic and positive spirit to the firm.

**T** 416-363-4783

**E** [tgoulding@osullivanlaw.com](mailto:tgoulding@osullivanlaw.com)

**Exceptional solutions.  
Your needs are as unique as you.**

TD Bank Tower, Toronto-Dominion Centre  
66 Wellington Street West, Suite 3430, P.O. Box 68 Toronto, ON M5K 1E7