

**Blair L. Botsford**  
PARTNER

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## Overview

Blair's practice focuses on all aspects of trust and estate law for domestic and multijurisdictional private clients including: estate and succession planning; will and trust planning; incapacity and disability planning; probate and guardianship applications; charitable gift planning and private foundations; estate, trust and guardianship administration.

Plan well. Live well. Leave an organized estate. This is the vision Blair has carried throughout her 25+ years as a trust and estate lawyer. Blair believes that comprehensive estate planning provides value to clients, their families and businesses by helping to minimize risk as well as unnecessary cost and conflict. The result is peace of mind for everyone so attention can be focused on what matters most: living.

The illness or loss of a loved one is a stressful time. Clients come to Blair for advice and services with respect to their executor, trustee, guardian or power of attorney roles that is practical,

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## AREAS OF PRACTICE

- Estate Planning including High Net Worth and Cross-Border and Multijurisdictional Succession
- Trust Planning
- Will Planning
- Incapacity Planning and Guardianship Applications
- Charitable Gift Planning
- Complex Trust and Estate Administration
- Advice to Executors and Trustees, Attorneys, Guardians and Legal Representatives
- Advice to Estate and Trust Beneficiaries
- Advice to Financial Institutions and Charities
- Estate Dispute Resolution

## BAR ADMISSIONS

Ontario, 1997

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sensitive and tailored to their needs. Blair also advises beneficiaries of estates and trusts.

Committed to helping people resolve will, trust and estate disputes in an efficient and cost-effective manner, Blair also offers alternative dispute resolution services as part of her practice.

In addition, Blair regularly advises financial institutions, charities and other lawyers with respect to trust, estate and related matters.

## EDUCATION

**University of Windsor**, Faculty of Law,  
Windsor, Ontario, Canada

- Executive Certificate in Conflict Management - 2018

**McMaster University**, Faculty of Arts,  
Hamilton, Ontario, Canada

- M.A. - 1995 (Economics)

**University of Western Ontario**, Faculty of Law,  
London, Ontario, Canada

- LL.B. - 1994

**University of Waterloo**, Faculty of Arts,  
Waterloo, Ontario, Canada

- B.A. - 1990 (Hons., Economics)

## Professional Activities

- Accredited Trust and Estate Practitioner (TEP), [Society of Trust and Estate Practitioners](#) (STEP)
- Member, [Canadian Bar Association](#)
- Member, [Ontario Bar Association](#) (estates, tax and elder law sections)
- Member, [International Bar Association](#)
- Member, [Canadian Tax Foundation](#)
- Member, [Toronto Estate Planning Council](#)
- Member, STEP Toronto Membership Committee
- Member, STEP Global Membership Committee
- Member Editorial Board, [Personal Tax and Estate Planning Journal](#) (Carswell)

## Presentations

### Upcoming

- “Multijurisdictional Planning and Administration for Minors,” at the STEP Spotlight Cross-Border Event, December 12, 2023.

## Recent

- [“Estate Planning and Administration for Unique Assets,”](#) at the Ontario Bar Association’s (OBA) Trusts and Estate Section, via webinar, on November 23, 2023.
- [“Estate Planning and Administration for Persons with Disabilities: Tips, Traps, and Common Ground,”](#) at the GTA Accountants & Finance Network (GTAAFN), via webinar, on November 22, 2023.
- “Updates from Canada: Private Trust Corporations and Foundation Companies” at the STEP Bermuda Conference, November 2, 2023. [Members only event]
- [Tales from Toronto: Trust, Estate and Tax Traps with Budget 2022 Update,](#) STEP Cayman, 2022
- Mastering Difficult Conversations in Elder Care, Stitt Feld Handy Group Workshop, 2017
- Managing Critical Communications: Mastering Personalities and Situations, Ontario Bar Association, 2017
- Estate Planning for Non-Traditional Families, Ontario Bar Association, 2015
- Estate Administration Panel Discussion”, STEP Bermuda, 2012
- Insurance Trusts – Formalities of Inter Vivos and Testamentary Insurance Trusts, Ontario Bar Association, 2011

## Publications

- [“Estate planning conundrum: how to make a somber task less daunting,”](#) Giving to McMaster, June 8, 2023
- “Gratuitous Transfers and Presumptions: The Journey from Pecore to Mak (Estate) and Beyond,” Personal Tax & Estate Planning Journal, 2021
- “Consent, Capacity and Medical Assistance in Dying: Legal Issues That Transcend Financial Means,” Personal Tax & Estate Planning Journal, 2021
- “Bare Trusts and Trusts that are Barely There,” STEP Toronto Journal, 2019
- “Long Term Care and Visitor Restrictions in a Time of Pandemic and Beyond”, Ontario Bar Association, 2020
- “Real Estate Meets Trust Law: Land Registration Ontario Style,” Ontario Bar Association, 2020
- [“Disability Support: Guardianship Applications,”](#) LAW360, 2020
- [“Preserving Disability Support Benefits and Post Mortem Planning,”](#) LAW360, 2019
- “Milne Estate: An Inconvenient Marriage of Legal Concepts,” STEP Toronto Journal, 2018

- “Will and Probate Planning, Chapter 2, Miller Thomson on Estate Planning,” Carswell, 2015
- “Discretionary Trusts & Final Termination Provisions, OBA Trusts and Estates Section,” 2012
- “Insurance Trusts,” Ontario Bar Association, 2010
- “Trust Compliance Post Antle,” Miller Thomson – Wealth Matters, 2010
- “The Long Arm of the CRA: New Policy for Acquiring Taxpayer Information,” Miller Thomson – Charities Newsletter, 2010
- “Multiple Testamentary Documents,” Law Society of Ontario, 2010
- “Richardson Estate Review,” Ontario Bar Association, 2009
- “Carlisle Estate Revisited,” Ontario Bar Association, 2008

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