

# Michael Taylor

## Partner

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Investment Management
Registrant Regulation & Markets
Private Funds, Hedge Funds & Alternative Investments
Mutual Funds
Derivatives
Gas Contracting

Michael practices investment management and securities law. He focuses in the areas of:

- registrant regulation
- securities compliance
- derivatives compliance, business conduct, registration and documentation matters
- hedge/pooled/private equity funds

Michael advises securities registrants throughout their securities registration and compliance lifecycles, including foreign and Canadian advisers, dealers and fund managers on registration and ongoing securities compliance matters.

He also advises both offshore and domestic hedge and private equity funds on the sale of their product in Canada and the regulatory aspects of private placements.

Additionally, Michael acts for advisers, dealers, investment funds and other end users that use derivatives, including:

- negotiating ISDAs, futures agreements and other standard documentation
- advising on derivatives regulatory compliance, registration and business conduct matters

## Experience

- Counsel to Guardian Capital Group Limited in its $1.67 billion go-private transaction with Desjardins Global Asset Management Inc.
- Franklin Templeton (NYSE:BEN), a global investment management organization, in its acquisition of Legg Mason, Inc. (NYSE:LM)
- Acted for several of Canada's largest financial institutions on novel exemptive relief to allow for cross-border dealing and advising activities
- Advised on novel agent compensation representative structure for an adviser subsidiary of one of Canada's leading financial institutions

## Insights & Events

- Author, "The future is now: CIRO's compliance report for 2026", BLG Article, April 2026
- Author, "Autorité des marchés financiers consultation on fee recalibration", BLG Article, September 2025
- Author, "CIRO proposes new conception of the OEO Dealer model", BLG Article, September 2025
- Author, "Impact of new rules on complaint handling on dealers and advisers", BLG Article, May 2025
- Author, "Everything you need to know about the Canadian Investment Regulatory Organization (CIRO): a dynamic resource", BLG Article, February 2025
- Author, "OSC's Investment Management Division Report focused on AI, crypto and ESG", BLG Article, December 2024
- Author, "CIRO investment dealer proficiency requirements: What's new and what's next?", BLG Article, September 2024
- Author, "CIRO requests comments on major changes to Investment Dealer Approved Person proficiencies", BLG Article, September 2023
- Pearls of wisdom: Investment management regulatory trends and preparing for the new SRO, BLG Video, January 2023
- Author, "New Single SRO and Protection Fund for year-end 2022 – status and next steps", BLG Article, August 2022
- Author, "Fund total cost reporting – Coming to investor statements by 2025?", BLG Article, June 2022
- Author, "Surging through 2021 to 2022: BLG's Vision of the Client Focused Reforms", BLG Article, February 2021
- Author, "CSA seek to require registrants to help defend clients against financial exploitation ", BLG Article, July 2020
- Author, "CSA provide further flexibility for securities registrants - CRM Specialists and CCOs", BLG Article, July 2020
- Author, "Surging to 2021: BLG's 2020 Vision of the Client-Focused Reforms", BLG Article, January 2020
- Author, "OSC's Regulatory Burden Reduction Proposals – Potential Benefits to Investment Funds and Registrants", BLG Article, December 2019
- Author, "CSA Regulatory Burden Reduction Proposals for Investment Funds: A solid step in the right direction", BLG Article, October 2019
- Author, "Concrete Regulatory Burden Reduction From the OSC: A Great Start (Maybe Not as Good as We Had Hoped)", BLG Article, July 2019
- Author, "Department of Finance Reveals Resolution Regime for Financial Market Infrastructures", BLG Article, April 2019
- Author, "ISDA Reveals Framework for Smart Derivatives Contracts", BLG Article, November 2018

- Author, "Cryptocurrency and Blockchain — Charting Recent News and Developments", BLG Article, September 2018
- Author, "OSFI Proposes Changes to its Leverage Requirements Guideline", BLG Article, August 2018
- Author, "CSA Releases Derivatives Business Conduct Rule for Further Comment", BLG Article, June 2018
- Author, "Long-awaited Proposed Canadian Derivatives Registration Arrives", BLG Article, April 2018
- Author, "Canadian Government Tables Bail-In Regulations", BLG Article, August 2017

## Beyond our Walls

### Professional Involvement

- Member, Law Society of Upper Canada
- Member, Ontario Bar Association

### Community Involvement

- Past Volunteer, BLG Reads to Kids
- Past Volunteer, BLG Client Counselling Competition

## Awards & Recognition

- Recognized in the 2027 edition (and since 2025) of *The Best Lawyers in Canada* (Mutual Funds Law)

## Bar Admission & Education

- Ontario, 2012

- JD, University of Toronto, 2011
- BSc (Hons.), University of Toronto, 2006

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