



## Nancy Golding QC

Partner

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Nancy is a tax partner in BLG's Calgary office, as well as the National and Regional Leader of the Private Client Group.

She works exclusively in estate/tax planning, estates, estate and fiduciary litigation and mediation of trust and estate disputes. She has extensive experience preparing all documentation required for the administration and probate of estates and applications for dependants, as well as in drafting domestic and international wills, enduring powers of attorney, personal directives, and trusts.

Nancy has extensive experience with:

- pre-trial applications;
- trial and appellant work in estate and fiduciary litigation;
- acting on behalf of trustees, administrators, executors and beneficiaries, attorneys and agents relating to the interpretation and validity of wills and trust agreements;
- creditor claims against estates;
- breach of trust allegations;
- removal and replacement of executors;
- executors' compensation;
- disputes among beneficiaries;
- applications to vary wills and trusts;
- enduring power of attorney for financial and health care; and
- disputes and accounting applications.

In addition, Nancy has extensive experience in mediation and judicial dispute resolution as an alternative to estate litigation, having completed the STEP Advanced Mediation Course. Nancy is a designated Associate of the Chartered Institute of Arbitrators (ACI Arb) and an ACTEC Fellow.

## Experience

- Representing individual clients and trust companies in fiduciary litigation pertaining to issues relating to wills, estates and trusts issues and the role of guardians, trustees, attorneys pursuant to powers of attorney documents and other fiduciaries, and the abuse of such roles.
- Mediation and arbitration of fiduciary disputes.
- Advising financial institutions concerning estates, beneficiary claims, estate litigation and their role as trustees pursuant to trusts, wills, dependent adult orders and as attorneys pursuant to enduring powers of attorney.
- Assisting individual clients and private company clients with succession planning including the use of discretionary trusts, wills and enduring powers of attorney and estate freezes to minimize tax liability. Also, methods by which a business can be passed on to the next generation in a tax-effective manner including work with farm families.
- Advising clients, both corporate and individual, on a wide variety of issues pertaining to the establishment, operation and regulation of charitable and other not-for-profit organizations and foundations, the establishment of such organizations and continuing legal advice relating to the operation of the same.
- Advising clients, both individual and corporate, regarding matters relating to the administration of an estate including applications for letters probate and letters of administration, the realization and transfer of assets, claims against an estate, accounting and investment issues and matters pertaining to executors' compensation.
- Appointment by the Court of Queen's Bench of Alberta as Judicial Trustee and as a legal representative of a disabled person in a dependent adult litigation file.

## Insights & Events

- Author, "Contributor, Changing Families, International Wealth Disputes Forum, Cambridge Forums, Florence, October 2019.", BLG Article, October 2019
- Author/Speaker "Powers of Attorney: Weapons of Mass Destruction or Useful Tools," STEP Canada's National Conference, May 2018
- Author/Speaker "Powers of Attorney: Weapons of Mass Destruction or Useful Tools," STEP Canada's National Conference, May 2018
- Co-Author, "21st century estate practice: Shrunken heads and sperm," The Lawyer's Daily (LexisNexis Canada), August, 2017
- Author/Speaker "Unique Assets," STEP Canada's National Conference, June 2017
- Author/Speaker "The Story of "Emma" and "Isabella" The Litigious Embryos and Other Tales," Legal Education Society of Alberta's 50th Anniversary Refresher, May 2017
- Speaker "Capacity and the Aging Client," Independent Financial Brokers of Canada Alberta Spring Summit, April 2017
- Speaker "Tips, Traps and Select Issues in Trust Drafting and Administration," STEP Calgary, January 2017
- Contributor, International Wealth Disputes Forum, Cambridge Forums, Venice, October 2016

- Author, "Estate Planning for the Future Family – Legal Issues Regarding Use of Genetic Material, Assisted Reproductive Technology and Posthumous Conception," STEP Global Congress, Amsterdam, June, 2016
- Speaker, "Patchwork Families – Defining the Modern Family," STEP Global Congress, Amsterdam, June, 2016
- Co-Speaker, "What's New at the Zoo," BLG In-House Seminar, April 2016
- Regular contributor, STEP INSIDE column -Society of Estate and Trust Practitioners' publication, "In the Headlines," 2004-present

## Beyond Our Walls

### Professional Involvement

- Fellow, American College of Trust and Estate Counsel, 2000-present
- Member, Canadian Bar Association, Wills and Estates Subsection, 1984-present
- Member, Calgary Estate Planning Council, 2000-present
- STEP Worldwide Board, Chair, 2021
- STEP Worldwide Board, 2017-2020
- Canadian Representative, STEP Worldwide Council, 2013-2020

## Awards & Recognitions

- Recognized in the 2021 edition of *The Best Lawyers in Canada*®- Lawyer of the Year (Trusts and Estates).
- Recognized in the 2021 (and since 2006) edition of *Best Lawyers in Canada*® (Trusts and Estates).
- Recognized in the 2021, 2019 (and since 2013) edition of *Canadian Legal Lexpert*® *Directory* (Estate & Personal Tax Planning).
- Recognized in the 2020 edition of *Chambers High Net Worth* (Private Wealth Disputes).
- Ranked in *Chambers Canada Private Client* since 2016.
- Lawyer of the Year 2017, Calgary, Canada Trusts and Estates, *The Best Lawyers in Canada*®.
- Recognized in the 2017 edition of *Chambers High Net Worth* (Private Wealth Law).
- Martindale-Hubbell® BV® Distinguished™ 4.4 out of 5 Peer Review Rated.
- Volunteer of the Year Award, STEP Canada, 2012.
- STEP World Wide Founder's Award 2011.

## Bar Admission & Education

- Alberta, 1984
- Certificate of Conflict Management, University of Calgary, 1997
- LLB, University of Alberta, 1983
- BSW, University of Calgary, 1980



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