



# Paul W. Taylor

Partner

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Paul's practice focuses on trust, estate, and incapacity planning and administration, as well as corporate law.

His extensive experience includes:

- planning for individuals with high value and complex assets
- working with clients to provide for beneficiaries with disabilities
- preparing, amending and interpreting trusts for indigenous groups

Paul's corporate law experience includes the implementation of corporate structures as part of tax and other planning.

Paul completed a secondment with a major Canadian financial institution to assist in the interpretation and administration of wills, powers of attorney and trusts.

## Experience

- Drafting wills, powers of attorney and trusts, including multiple wills for individuals with owner-managed businesses, wills and trusts with provisions providing for the care of beneficiaries living with disabilities and wills containing testamentary trusts.
- Administering and assisting in the administration of estates and trusts.
- Advising on corporate restructuring for planning purposes.

## Insights & Events

- Author, "The OSC wants registered firms' "go bags" packed and ready: how firms can tailor their packing lists and how owners can protect their legacies", BLG Article, September 2024
- Panel Moderator, "Planning for and Managing Incapacity: A Nuts and Bolts Approach," STEP National Conference, Toronto, June 2023.
- Speaker, "The New Trust Reporting Rules," Investment Association of Canada Breakfast, Toronto, April 2023.
- Speaker, "Tax Issues: on Settlement, Treatment of Registered Plan Assets on Death (RESP/RDSP)", LSO Estates and Trusts Summit, Toronto/Online, October 2022.
- Co-Host, STEP National Conference, Online, June 2022.
- Panel Moderator, "Trust and Estate Law Update," STEP National Conference, Online, June, 2022.
- Panel Moderator, "Wealth Planning in the Digital Age", STEP National Conference, Online, June 2021.
- Contributor, "Conflict of Laws in Estate Planning," STEP Canada Branch/Chapter Bundle, March 2021
- Panel Moderator, "Tax Update," STEP Canada Branch/Chapter Bundle, February 2021.
- Panel Moderator, "All in the Family," STEP Canada Branch/Chapter Bundle, January 2021.
- Panel Moderator, "Trust Me for Now But Not Forever: Trust Variation, Amendment, and Potential Tax Consequences", STEP -Speakers Series, Online, October 2020.
- Speaker, "Canada and U.S. Cross Border Planning for Mobile Families," STEP Orange County 9th Annual Institute on Tax, Estate Planning and the World Economy, Newport Beach, February 2020.
- Moderator, "Taxation of Trusts and Estates," STEP Full Day Course, Ottawa, January 2020.
- Private Companies: The Next Generation, BLG Perspective, December 2019
- Speaker, "Voluntary Disclosure in Estate Matters," LSO Six-Minute Estates Lawyer, Toronto, April, 2019
- Panel Moderator, "the Complexities of Domestication: Extra-jurisdictional Recognition and Enforcement of Judgments", STEP National Conference, Toronto, June 2019.
- Speaker, "Incapacity and Other Legal Issues," IAFP 2018 Symposium, Gatineau, September 2018
- Moderator, "Planning and Administering a Discretionary Trust – Absolute Freedom?" STEP National Conference, Toronto, May 2018.
- Speaker, "Cross Border Tax Update," LSO Six-Minute Estates Lawyer, May 2018.
- Speaker, "2018 Federal Budget: What Every STEP Advisor Needs to Know," STEP National Webcast, March 2018.
- Author, "Federal Budget 2018 – A Continued Focus on Fairness and the Middle Class", BLG Article, February 2018
- Speaker, "Jurisdictional Issues in Powers of Attorney," LSUC Estates and Trusts Summit, Toronto, October 2017.
- Speaker, "Wills, Estates & Incapacity," Law Society of Nunavut, September 2017.
- Moderator, "International Planning Issues – Updates from the UK to the Far East", STEP National Conference, Toronto, June 2017.

- Speaker, "Border Walls and a Hard Brexit: The Current State of Cross-Border Planning," LSUC Six-Minute Estates Lawyer, Toronto, May 2017.

## Beyond Our Walls

### Professional Involvement

- International Fellow, ACTEC
- Member, Law Society of Ontario, Law Society of Nunavut, Canadian Bar Association and County of Carleton Law Association
- Society of Trust and Estate Practitioners (STEP) Worldwide: Recipient of STEP Worldwide Founders Award, International Client Global SIG Steering Committee member
- STEP Canada: Board Member; Chair of STEP National Conference; member of Programming Committee and STEP Inside Editorial Board; former member of Membership Committee, Student Committee, and Human Resources Committee;
- STEP Ottawa: Former Chair and Board Member

### Community Involvement

- Former Board President, Ottawa Salus
- Former board member, Bruce House
- Former board member, Ryan's Well Foundation
- Former board member, Fund for a New Generation
- Guardian, Youth Parliament of Manitoba Inc.

## Awards & Recognitions

- Recognized in the 2025 edition (and since 2024) of *The Canadian Legal Lexpert Directory* (Estate & Personal Tax Planning)

## Bar Admission & Education

- Ontario, 2008
- Nunavut, 2017
- LLB, University of Manitoba, 2007
- Faculty of Arts, University of Manitoba

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