



## Paul 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.
- Drafting intellectual property and information technology licenses.
- Drafting agreements and supporting documentation for corporate transactions, including share and asset purchases.

## Insights & Events

- Private Companies: The Next Generation
- Speaker, "Voluntary Disclosure in Estate Matters," LSO Six-Minute Estates Lawyer, Toronto, April, 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.
- Federal Budget 2018 – A Continued Focus on Fairness and the Middle Class
- 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.
- Law Commission Of Ontario ("LCO") Released Its Final Report On Legal Capacity, Decision-Making And Guardianship
- Speaker, "Common Complexities: There is no such thing as a simple estate," STEP Ottawa, February 2017.
- Instructor, "Changes to Testamentary Trust Rules – A Comprehensive Case Study," Canadian Tax Foundation National Conference, November 2016.
- Speaker, "Taxation of Inter Vivos Trusts, GREs, and Testamentary Trusts – Where are we now?" Canadian Tax Foundation Ontario Conference, October 2016.
- Panelist, "Advising Families with Special Needs," STEP National Conference, Toronto, June 2016.
- Co-author, "Federal Budget 2016 – A Focus on the Middle Class and Continued Scrutiny of Corporate Tax Avoidance," BLG Publication, March 22, 2016
- Speaker, "Dealing with Incapacity Issues and Preventing Financial Abuse," STEP Ottawa, September 2015.

## Beyond our Walls

### Professional Involvement

- Member, Law Society of Ontario, Law Society of Nunavut, Canadian Bar Association and County of Carleton Law Association
- Ottawa Branch Vice Chair, National Conference Planning Committee Member, and National Publication (STEP Inside) Editorial Board Member, Society of Trust and Estate Practitioners (STEP)

### Community Involvement

- 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.

## Bar Admission & Education

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

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