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2019

How lawyers are ranked

Every year we carry out thousands of in-depth interviews with clients in order to assess the reputations and expertise of business lawyers worldwide. The qualities we look for (and which determine rankings) include technical legal ability, professional conduct, client service, commercial awareness/astuteness, diligence, commitment, and other qualities most valued by the client.

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PRIVATE WEALTH LAW

Private Wealth Law

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- **Davies Ward Phillips & Vineberg LLP**
- **Fasken**
- **Gowling WLG (Canada) LLP**
- **Miller Thomson LLP** *
- **Norton Rose Fulbright**

Band 2
- **Aird & Berlis LLP**
- **Borden Ladner Gervais LLP**

Leading Individuals

Band 1
- **Carr** Howard *Fasken*
- **Hoffstein** Elena *Fasken*
- **O'Sullivan** Margaret *O'Sullivan Estate (ORL)* ◊
- **Roth** Elie *Davies Ward Phillips & Vineberg LLP* *
- **Steele** David *Torys LLP (ORL)* ◊
- **Thériault** Carmen *Norton Rose Fulbright*
- **Youdan** Tim *Davies Ward Phillips & Vineberg LLP* *

Band 2
- **Blumenfeld** Rachel *Aird & Berlis LLP*
- **Cohen** Brian *Gowling WLG (Canada) LLP* *
- **Fish** Arthur *Borden Ladner Gervais LLP*
- **Gibney** Paul *Thorsteinssons LLP (ORL)* ◊
- **Piccini Roy** Marilyn *Robinson Sheppard (ORL)* ◊
- **Rintoul** Margaret *Blaney McMurtry LLP (ORL)* ◊ *
- **Robinson** Patricia *Robinsons Law (ORL)* ◊
- **Rochwerg** Martin *Miller Thomson LLP*
- **Weigl** Corina *Fasken*

Band 3
- **Fowlis** William *Miller Thomson LLP*
- **Jenkins** Kirsten *Norton Rose Fulbright*
- **Rudick** Rhonda *Davies Ward Phillips & Vineberg LLP* *
- **Spetz** Ruth *Borden Ladner Gervais LLP*
- **Stevens** David *Gowling WLG (Canada) LLP* *
- **West** Laura *Norton Rose Fulbright*
- **Worland** Ian *Legacy Tax + Trust Lawyers (ORL)* ◊

* *Indicates firm / individual with profile.*
◊ *(ORL) = Other Ranked Lawyer.*
Alphabetical within each band. Band 1 is highest.

Private Wealth Disputes

Leading Individuals

Band 1
- **Burns** Clare *WeirFoulds LLP (ORL)* ◊
- **Dochylo** Daniel J. *Borden Ladner Gervais LLP*
- **Hull** Ian *Hull & Hull LLP (ORL)* ◊
- **Rabinowitz** Archie *Gowling WLG (Canada) LLP* *
- **Whaley** Kimberly *Whaley Estate Litigation (ORL)* ◊
- **Yach** Melanie *Aird & Berlis LLP*

Band 2
- **Charlebois** Kelly *Miller Thomson LLP*
- **Golding** Nancy *Borden Ladner Gervais LLP*
- **Lobl** David *Gowling WLG (Canada) LLP* *
- **Popovic-Montag** Suzana *Hull & Hull LLP (ORL)* ◊
- **Rintoul** Margaret *Blaney McMurtry LLP (ORL)* ◊ *
- **Stephens** Debra *Whaley Estate Litigation (ORL)* ◊
- **Vander Zee** Craig *Torkin Manes LLP (ORL)* ◊

Band 1

Davies Ward Phillips & Vineberg LLP

Davies Ward Phillips & Vineberg has *"always had a reputation for being one of the best in the area,"* says a market insider. Others add that *"they are very strong in the market,"* and *"certainly strong on tax and estate planning."*

A source comments on the *"very smart practitioners"* at the firm, adding: *"They are responsive and give top-rate advice."* Clients comment on the firm's *"very high reputation in the market,"* and say they *"really enjoy the integration of the range of services,"* describing it as a *"one-stop shop experience."* Interviewees further praise the the team for being *"very responsive"* and providing *"excellent service."*

Notable practitioners

Elie Roth (see p.70) has *"superb tax and estates knowledge,"* says one of his peers; *"he is a really, really bright guy and straightforward. He is very, very efficient and just a brilliant mind."* Roth is *"very highly skilled and knowledgeable in the area of estates and trusts,"* notes another source, adding: *"He has amazing abilities in that area."* Roth is especially recognised in the market for his tax expertise. One market insider says: *"He can take complex tax issues and boil them down to their essence. He separates the wheat from the chaff and makes practical suggestions. He is a very effective communicator."*

Tim Youdan (see p.70) *"understands trusts better than anybody,"* says a client. One of his peers praises his *"intellectual capability in dealing with complex trust issues,"* describing him as *"one of the masters in Canada."* A market insider adds: *"He is one of the most thoughtful experts in the area of estate and trusts."* Another explains: *"He is very experienced and brings that experience to issues that arise, which is beneficial. He has great command of the law and is very practical. He is diligent, responsive and focused."*

Montréal-based **Rhonda Rudick** (see p.70) is praised for her *"excellent communication skills"* by a source, who also says: *"She is easy to talk to, she is a nice person. Rhonda is the type of person you get a very theoretical, accurate answer from."* Rudick provides high net worth clients with comprehensive advice on estate and tax planning matters, working especially closely with private companies.

Fasken

Fasken is *"extremely strong,"* note market insiders, especially praising the strengths of the firm's planning team and recognising its presence in both Vancouver and Toronto.

One interviewee comments on the *"concentrated effort"* the firm has made with its expertise in the private wealth sector. A client is particularly *"impressed with the overall professionalism there,"* adding: *"They have a large footprint and a large HNW planning group."*

Notable practitioners

Howard Carr is considered a *"leading statesman in this space,"* says one of his peers, adding: *"He has a great client base and is a strong adviser. His clients really rely on him for legal, strategic and business input on matters."* Others praise his *"great technical skills"* and describe him as a *"very smart guy."*

Elena Hoffstein is an *"excellent estates lawyer and is very strong on philanthropic work; that is her great strength,"* notes one of her peers.

Another confirms: *"She is one of the leading practitioners in the private client space. She has a lot of expertise, in particular in the charity space. She has very strong experience on the trusts and planning side."* Others say Hoffstein is *"one of the top ones doing the wills."*

Corina Weigl is a *"great practitioner and an exceptional lawyer,"* comments a peer, adding: *"She has a lot of versatility. She actually can handle both planning and contentious files, which few practitioners can."* One source states Weigl has a *"great reputation in the city and the country. She would be my first go-to for a trusts estate wills lawyer at a high-end level."* One market insider *"wouldn't hesitate to put her in front of an ultra high net worth client because of her skill and knowledge."* The source explains: *"She connects well with all clients. She is a very personable, honest and thoughtful estate planner."*

Gowling WLG (Canada) LLP

Gowling enjoys an *"excellent reputation"* for both the contentious and non-contentious services it offers its high net worth clients. The firm is considered a *"go-to for trusts and estates work"* by sources, who comment that *"technically, they are all great. They are down-to-earth and able to explain complex situations and issues simply, without being condescending. They are very reasonable people, their fees are reasonable and overall they deliver an excellent client package."*

Clients add: *"The firm has lots of resources – nothing ever gets bogged down. They respond right away. They are so responsive and to the point. It is hard to see how they could get a lot better."*

Notable practitioners

Archie Rabinowitz (see p.70) is *"one of the best there is,"* says a market insider, adding: *"He is awesome. He is very smart at estates law and very keen on detail."* Another says: *"He has an encyclopaedic knowledge of the law. He knows all of it like the back of his hand. You have to have judgement on how far to press an issue and he does that exceedingly well. He is held in the highest of regards by members of the Bench and by members of the Bar. He treats people on the other side with respect."* One source praises Rabinowitz's manner in court, saying: *"Archie is the eye of the hurricane, the calm in the middle of the storm. When he talks, people listen – he is calm and reasonable."* An additional interviewee reports: *"Working with him is a fabulous experience, it is amazing. He certainly has the right temperament and is able to read the room and know how to present."*

Brian Cohen (see p.69) is recognised by market insiders for his *"expertise in both planning and tax,"* and is praised for his *"very sound understanding of the law and sound judgement."* Peers say he is an *"energetic lawyer"* and an *"all-round talented person,"* describing him as *"really bright and very technically astute."* One market insider says Cohen is a *"go-to for trusts, estates and wills,"* adding: *"He is very smart and he really connects with the clients. He lets them know what he thinks they need to do and does it in a way that is not overbearing or lawyerly."*

David Lobl (see p.70) is widely praised for his expertise in handling disputes involving wills, trusts and capacity issues. He is *"really a tough advocate – he is hard-nosed, he knows the law and protects clients' interests,"* notes a market insider, adding: *"He is a strong, energetic, young guy. He is the real deal."* A fellow litigator notes that *"he produces first-class material and has really strong presence in court,"* praising his *"understanding of the nuances and details relating to the law in estates."* Interviewees further comment that he *"knows how to get things done,"* explaining: *"It's all about the overall strategy and long-term vision, he is thoughtful and will not do anything rash."*

David Stevens (see p.70) advises high net worth clients on a range of private wealth matters such as estate planning and administration, with particular expertise in tax-related matters. *"He is a very easy person to work with. He is smart and communicates well,"* says one source. Another comments: *"He always brings his expertise to the table to make sure clients' tax affairs are structured in an efficient manner. Clients feel a level of confidence and trust with him. He makes the complex understandable to clients. He puts them at ease and makes them feel comfortable."*

Miller Thomson LLP

See profile on p.72

Miller Thomson is highly regarded in the market for advising clients on estate planning, trusts and philanthropic matters. The firm also boasts strong litigation capabilities, regularly handling trust and estate disputes.

"They have a very strong practice," notes one market insider, and another says: *"They are very good: they know what they are doing and are very savvy."* Clients add that *"the support processes seem to function seamlessly and the office is well supported."*

Notable practitioners

Kelly Charlebois is a *"very good"* lawyer and has a recognised trust and estate litigation practice. One fellow lawyer says she *"does a good job – she gets really involved and is really sharp."* A litigator notes: *"She is very timely, professional and tenacious. She takes a very practical approach to files."*

Martin Rochwerg is *"one of the leading practitioners in the country,"* says one of his peers, adding: *"He is an extremely sophisticated thinker, extremely good with clients and always a pleasure to work with. He is very smart, outgoing and has a huge depth of experience."* Another comments: *"He is very strong in seeing the big picture, in terms of integrated planning. He's great at seeing the pieces and putting them together in a useful way."*

William Fowlis QC is praised for his *"very thorough, broad knowledge"* by peers, who say he is *"very strong and very creative,"* particularly on tax-related private client matters. *"He is very strong on the technical side,"* notes a market insider, and another adds that *"he is very thoughtful in dealing with clients on the planning side and manages that well."*

Norton Rose Fulbright

Norton Rose Fulbright enjoys a strong reputation in the market; they are *"regarded as a very strong firm, particularly in Vancouver."* One interviewee notes: *"In Vancouver, they would be the place you would go to if you are a high net worth family with any kind of complex estate planning issues. They can handle very complex matters. They are constantly concerned about the client and what is next. They are proactive and collaborative."*

Market sources describe *"the quality of work and how they treat and prepare clients"* as *"extremely impressive,"* adding: *"They listen to the client and really take into consideration where they are coming from. They really soften the approach they have and take the time to explain things. They always present extremely well."*

Notable practitioners

Carmen Thériault is *"regarded as the dean"* and a *"leader out West"* by peers, who say: *"She has a great reputation and is exceptionally smart. She is a very versatile practitioner, extremely good at taking complex situations and simplifying them. She is a very strong thinker."* A source comments: *"She is very bright and knowledgeable on trust and estate planning. She is particularly good at explaining to clients what is being done and helping with incredibly difficult decisions. She is very good, she has worked with enough people she can help those that haven't had to deal with it before quite well. She helps clients come to decisions and how to handle things, it is more than just the technical side of establishing an estate plan. She is great."*

Vancouver-based **Kirsten Jenkins** focuses her practice on assisting high net worth clients with estate planning, trusts, business succession and capacity matters. One source comments: *"She really understands all the issues and doesn't leave any stone unturned. She really walks the client through everything. She explains all the bumps in the road that can happen so clients can make proper decisions."*

One market insider observes: *"She certainly is very experienced and knowledgeable as well. You get a complete sense of confidence when you deal with her."*

Laura West advises high net worth clients on a range of private wealth matters including estate, tax and philanthropic planning. One source comments: *"She is certainly knowledgeable on the tax front,"* Others note that she is *"very good to deal with,"* and that she *"takes a soft approach"* with clients. One market insider says: *"She is excellent. She is very friendly and very knowledgeable. She knows what she is talking about."*

Band 2

Aird & Berlis LLP

Toronto firm Aird & Berlis is well regarded nationally. The firm's estates and trusts team regularly advises high net worth individuals on succession planning and wealth structuring. One market insider says it is a *"very good firm with some very good people,"* noting that the firm is *"very strong"* on both planning and litigation.

Notable practitioners

Melanie Yach is a *"very good lawyer and litigator,"* say peers, adding: *"She has a well-deserved reputation in estate litigation. By reputation and on files she is very strong."* Yach advises private clients and trust companies on all aspects of estate planning and administration. Her practice has a strong focus on disputes involving trusts, estates and capacity issues.

Rachel Blumenfeld has a *"very strong reputation"* in the market. Peers say she is a *"really, really strong solicitor and is a pleasure to deal with,"* noting her particular strengths in will planning. *"She is a solid practitioner and a well-respected lawyer – she is well regarded and good with clients,"* adds a source.

Borden Ladner Gervais LLP

Borden Ladner Gervais is a *"great firm"* and *"well regarded"* in the market for offering clients assistance on trust and estate planning matters as well as related disputes. Clients *"appreciate the quality of advice and competence of staff,"* adding: *"They are consummate professionals, they work well as a team and they care."*

One interviewee praises the firm's *"very effective broad-based approach to problem solving,"* noting: *"They give timely advice and administrate everything properly. They are a go-to firm that really understands HNW clients and their needs."*

Notable practitioners

Daniel Dochylo is *"outstanding within this field,"* notes a market insider; *"he is technically very, very strong and knows the law inside out. He has very good, practical judgement and the ability to manage client expectations. He has great communication skills, he doesn't put a barrier between the client and lawyer in how he deals with matters."* One source says Dochylo is *"really a go-to person for contentious matters,"* adding: *"His drafting is just excellent, he is very concise and to the point and a real pleasure to work with. He is very strong and really the person you want to have in your corner."* Others praise the fact that *"he doesn't get ruffled and is able to take on any complicated situation in a calm way and provide advice."*

Arthur Fish has a *"very specialised practice involving capacity,"* notes a fellow practitioner. Another adds: *"He is very creative and excellent on complex trust structures."* One of his peers comments on Fish's work, saying: *"He practises a lot in mediation work. He works with big families and really important family offices and manages their whole estate plans. He is a tremendous drafter."*

Nancy Golding regularly acts for trustees, beneficiaries and individuals in wills disputes and powers of attorney matters. *"She is wonderful,"* says one of her peers, with another adding: *"She really is quite brilliant and a formidable litigator."* Others say she is *"professional, practical and a delight to work with,"* as well as being *"reasonable, not a pushover and always an advocate for her client."*

Ruth Spetz is a *"tax lawyer with a focus on private wealth matters,"* notes a market insider, adding: *"She is a very, very smart person. She has a significant amount of experience as trustee and director of entities that are incorporated by HNWIs to efficiently organise their affairs. She really understands this part of the law and is really one of the best."* One source says Spetz is *"fantastic,"* praising the *"combination of her high level of technical expertise with the discretion and her approach to dealing with HNW family members."*

Other Ranked Lawyers

Clare Burns of WeirFoulds is *"one of the best,"* says a fellow lawyer; *"she is a very strong, formidable litigator. She is very creative and really strategises extremely well."* Burns previously served as the Children's Lawyer for the Province of Ontario. As *"one of the top names on the litigation side,"* Burns is seen as a *"top-tier, tenacious litigator"* and *"tough as nails."*

Paul Gibney of Thorsteinssons is recognised for advising high net worth individuals, family offices, businesses and charities on a variety of tax-related private wealth matters. *"He is regarded in the city and the country as the best combined tax and estates lawyer,"* says a fellow practitioner. Another notes: *"He is an excellent tax lawyer. Paul is really an excellent practitioner and a very creative lawyer. He really gets very strong results for his clients and is very easy to deal with."* Others appreciate he has *"got a very good grasp of all trust issues as well as international issues,"* adding: *"He is very attuned, very up to speed on everything and knows all the trends."*

Ian Hull of Hull & Hull is *"really a brilliant litigator,"* states one of his peers. *"He has a very good reputation and is a go-to person for estate litigation,"* says another, adding: *"He is very knowledgeable doing both disputed work and mediation."* Peers further describe him as an *"excellent negotiator,"* adding: *"He digs in and really does a good job. He is great to work with and a very funny guy."*

Margaret O'Sullivan, founder of O'Sullivan Estate Lawyers, is an *"outstanding estates lawyer,"* says a peer, adding: *"In Ontario, she is probably one of the leading estates lawyers. She has great international abilities, she does a lot of multi-jurisdictional work and handles a lot of private international law issues."* One market insider agrees: *"She is a renowned expert in the field. She completely knows her stuff and has in-depth expertise in this area."* The source continues: *"She is highly professional, solution-oriented, calm and collected, and very precise. She is very effective in her work, a true professional and her clients are always happy."*

Marilyn Piccini Roy of Robinson Sheppard Shapiro is regarded by sources as *"one of the strongest solicitors in Québec,"* and is described as an *"old-school lawyer who is deeply committed to client service."* A fellow practitioner says: *"She has wonderful technical ability. She puts together good presentations, and has good written skills and communication ability."* Another enthuses: *"She is an exceptional lawyer. For more difficult and thorny issues she is someone whose opinion is valued. She has incredible depth of knowledge and is extremely strong."*

Suzana Popovic-Montag is managing partner of Hull & Hull and is *"well respected"* in the market. Peers describe her as *"excellent,"* adding: *"She knows what she is doing."* One market insider notes she is *"very skilled as a litigator,"* praising her *"impressive, wide-ranging knowledge."*

Margaret Rintoul (see p.70) of Blaney McMurtry is well regarded for her advice on both non-contentious and contentious trust and estate matters. *"She is very well rounded,"* says one of her peers, who notes her strengths in handling *"litigation, planning and charity"* matters. *"Her reputation is pretty much best in*

the business in Toronto," says a market insider, *"she is respected by everybody."* Another comments: *"She is always responsive and proactive. She provides down-to-earth advice and guidance but is also able to come up with unique solutions. Her greatest strength is her depth of knowledge and the ability to apply that knowledge to difficult situations in a way that both professionals and laypersons can understand. Her attitude and demeanour is always positive even in the most stressful situations."*

Patricia Robinson of Robinsons Law is described by one of her peers as a *"very strong practitioner,"* and as *"a very strong lawyer"* who *"does the full range of estate planning – she is extremely well regarded and has a good reputation."* Robinson is a *"top practitioner,"* says another of her peers, noting: *"She is very good to work with and she is very good with clients. Clients love her – she has a very strong client focus."*

David Steele of Torys is *"one of the best estate planners,"* according to a market insider, who comments that *"it is his thoughtful approach and knowledge of how outcomes work in a practical way. He has foresight in putting in place things that will affect people's future. He understands ramifications and can relay his thoughts in a very succinct and easy-to-understand way."* Another source describes Steele as an *"excellent trust and estate lawyer,"* explaining that he is a *"very thoughtful individual"* who *"makes good, clear, recommendations and decisions."* One of his peers adds: *"He is very good to work with, very smart, practical and diligent."*

Debra Stephens of Whaley Estate Litigation is *"well known in the profession,"* notes a market insider. Another describes her as a *"very thoughtful person,"* explaining: *"She will take into account all different constituents in a very fair way."* Peers report Stephens is *"very detail-oriented and provides detailed analysis."*

Craig Vander Zee of Torkin Manes is a *"very good practitioner,"* says one of his peers, explaining: *"He understands the nuances of the realities of life in terms of the clients and expectations and trying to manage them. He understands and knows the legal basis for what he is doing so is able to apply it well."* Another litigator comments: *"He is an excellent mediator. He is just an all-round really good, careful, cautious lawyer. He is very competent, very skilled and able to defuse really emotional situations."*

Kimberly Whaley is the founding partner of Whaley Estate Litigation and is deemed to be one of the *"strongest in the market"* by peers, who say she is *"very, very strong in court and a tenacious litigator"* and has a *"very strong, deep academic understanding of the area."* A fellow litigator comments: *"She is at the top of the list. She is extremely hard-working and well prepared whenever she takes on a case."*

Ian Worland of Legacy Tax + Trust Lawyers has an *"outstanding reputation"* and is *"one of the leading tax practitioners in Canada,"* enthuses a fellow private client lawyer. *"He is very strong on the taxation of trusts and is a very creative thinker,"* notes another one of his peers, adding: *"He is a very, very smart, thoughtful practitioner."* Others say he is *"very well thought of and has a deep history in the business,"* and add: *"He is a client service guy and is very sensitive to making sure things get done."*

FAMILY/MATRIMONIAL High Net Worth

Family/Matrimonial: High Net Worth
Leading Firms
Band 1
Blaney McMurtry LLP
Epstein Cole LLP
Martha McCarthy & Co.
Leading Individuals
Band 1
Edney James *Blaney McMurtry LLP* *
Franks Aaron *Epstein Cole LLP*
McCarthy Martha *Martha McCarthy & Co.*
Niman Harold *Niman Zemans Gelgoot (ORL)* ◊
Smith Bryan *Lerners LLP (ORL)* ◊
Band 2
Fogelman Herschel *Fogelman Law (ORL)* ◊
Piafsky Judy *Blaney McMurtry LLP* *
* *Indicates individual with profile.*
◊ *(ORL) = Other Ranked Lawyer.*
Alphabetical within each band. Band 1 is highest.

Band 1

Blaney McMurtry LLP

Blaney McMurtry is a *"best of class firm,"* says one source, with another adding: *"Blaney is a large firm with significant resources and depth of expertise but still operates like a small firm that can appreciate, understand and anticipate the needs of their clients."*

The family group assists with a wide variety of matters involving marriage, separation, divorce and cohabitation. One client comments on the breadth of the firm's offering, saying: *"The thing about Blaney is that they've got it all there. They've got everything for wealthy clients under one roof. Every legal problem can be dealt with by someone at that firm. They check all boxes."* Sources add that it is an *"excellent firm"* offering *"superior value on all of their files."*

Notable practitioners

James Edney (see p.69) is widely praised in the market by both peers and clients, with one client commenting: *"Jim is a tremendous lawyer but more importantly he understands the critical role he plays in a client's affairs and how to manage that role to perfection."* One market source says: *"He is a seasoned, very experienced lawyer. He is able to handle high net worth clients and complex matrimonial litigation. He is strategic on how to achieve the best possible outcome for his clients."* Another describes him as an *"intelligent, thoughtful, reasoned and reasonable lawyer"* who is *"direct and easy to deal with."*

Judy Piafsky (see p.70) has *"a reputation for being both tough and reasonable. She has a very high integrity and an excellent reputation among clients."* One source comments that her *"legal and people skills are exceptional,"* particularly praising her *"diligence, hard work, intelligence, and results."* The source continues: *"Judy has always taken the time to explain things with a level of meticulous attention to detail that is unparalleled."* Another source adds: *"She is extremely diligent, hard-working, and has an excellent work ethic and commitment to her clients."*

Epstein Cole LLP

Epstein Cole is *"a top-tier firm, no doubt,"* says one interviewee, describing it as an *"uber-boutique family law firm."* Others say it is *"the biggest family law firm in Toronto,"* adding that *"they are very strong"* and have *"tough lawyers and tough litigators."*

Epstein Cole acts for domestic and international clients on a full range of family disputes in court, arbitration and mediation. The team also advises on divorce issues including property, support and custody.

Notable practitioners

Aaron Franks is well regarded in the market as both a litigator and mediator. *"He is an excellent lawyer, he is very smart and capable,"* says one of his peers, adding: *"He is funny, charming and a good guy."*

Martha McCarthy & Co.

Martha McCarthy & Co is a highly esteemed boutique family law firm. The team advises on a full range of family issues including divorce, separation agreements, custody, mobility matters and child support. The firm also offers clients high-level representation in mediation and arbitration.

Founding partner Martha McCarthy is highly regarded and experienced, with over 25 years of experience in family law.

Notable practitioners

Martha McCarthy is at the *"absolute top end of the market,"* say peers, adding: *"She is very tough, very smart and knows the law. She doesn't waste time on nonsense."* Market insiders further describe her as a *"great lawyer with a good firm."*

Other Ranked Lawyers

Herschel Fogelman of Fogelman Law is a *"go-to mediator and an excellent arbitrator,"* reports one of his peers, adding: *"He treats clients well and with dignity and respect and that makes him effective from a mediation perspective. He is a listener, he doesn't pre-judge things. He hears evidence cleanly and clearly and assimilates that correctly with the law."* Another comments: *"He has an ability to identify with people very quickly, he leads with the personal rather than the legal. His approach is that of someone who wants to make people feel they are being taken care of in a high-end capacity."*

Harold Niman of Niman Zemans Gelgoot is a *"very strong family lawyer,"* say sources, describing him as *"tenacious and pragmatic"* and adding that *"he has no fear."* He is a *"top-tier practitioner and top in the market,"* says one of his peers, noting: *"He is a force of nature, he has amazing capabilities. He is very smart."* Niman is also said to be a *"brilliant trial lawyer."*

Bryan Smith of Lerners advises on a full range of family law issues including custody, access, support and property issues. He also has experience acting as both a mediator and arbitrator. Market insiders say Smith is *"known as a go-to person for arbitrations,"* adding: *"You know you're not going to get any gamesmanship. There is no messing around. He is an honest, decent person. He understands the law and is very detail-oriented."*

ACCOUNTANTS & TAX ADVISERS

Accountants & Tax Advisers

Leading Firms

- BDO Canada LLP
- Cadesky Tax
- Crowe Soberman LLP
- KPMG LLP
- PricewaterhouseCoopers

BDO Canada LLP

BDO has a *"strong reputation in the market,"* with sources describing the firm as *"excellent."* The private client team advises high net worth individuals and families on both domestic and international tax-related trust and estate planning matters. It also handles tax compliance issues as well as assisting with charitable giving and investment plans.

One source describes the team as *"very helpful and knowledgeable,"* adding: *"I think they are top-notch."* Another comments: *"They are responsive and proactive in managing things for clients."*

Key contacts:

Deborah Graystone, Partner and Private Client Service Practice Leader

Hal Sloan, Partner – Canadian Tax

Cadesky Tax

Toronto-based Cadesky Tax is *"excellent,"* says a source, explaining: *"They are really one of the top firms. When there are changes in legislation, they grasp it, they deal with it, they come up with solutions and criticisms. They really are at the forefront."*

The firm is especially recognised for handling cross-border matters between the USA and Canada. A commentator notes Cadesky Tax for its *"very strong Canadian-US practice,"* and adds: *"Their technical expertise is extremely strong, and they have a strong reputation in this space."* Another interviewee says: *"They certainly have a presence; a lot of it is to do with cross-border stuff, a lot of US taxation. They've got quite a niche there, they've been very active."*

Key contact:

Michael Cadesky, Managing Partner

Crowe Soberman LLP

Crowe Soberman is widely praised by market sources for both its domestic and cross-border abilities. The team is recognised for its work with high net worth clients on a variety of local and international tax matters. *"They are very good in the high net worth space, on both the tax and accounting sides, and particularly on cross-border matters,"* reports a market insider.

Canadian sources highlight Crowe Soberman for the quality of its professionals and the client service they provide. *"They are strong and have some strong, tactical people,"* notes a commentator. Another interviewee says: *"My experience with them is very good. They're very knowledgeable. They know their tax and give a very good service – very responsive and helpful."*

Key contact:

Karyn Lipman, Senior Partner – Tax

KPMG LLP

KPMG is well recognised in the market for providing tax advice to high net worth individuals and families in relation to wealth and estate planning matters, as well as for regularly assisting clients with significant closely held businesses.

"They are very good and have a lot of very good practitioners," says a source, with another commenting: *"They are very strong in the private client space."* One market insider further notes: *"They have got great clients, a really good client base and really interesting work. It is creative and interesting tax planning."*

Key contact:

Dino Infanti, Partner and National Leader – Enterprise Tax

PricewaterhouseCoopers

PwC is highly regarded for the tax and accounting services it offers to high net worth individuals and families. *"They are by far the biggest. They are by far and away the strongest. They've got the strongest technical group on the tax side and on the charities side,"* says a source.

A market insider comments on the team's strengths, saying: *"They are excellent – Bruce Harris and Angela Ross are really, really good. They are extremely knowledgeable, responsive and quick and provide reliable answers to difficult tax questions."* Another states: *"They have top-notch expertise. They are all exceptionally strong technically and extremely easy to work with. The team has a great depth of experience. The people in their high net worth group really focus exclusively on this space and they have a level of expertise that the others don't."*

Key contacts:

Angela Ross, Partner

Bruce Harris, Partner

Jason Safar, Partner

PRIVATE BANKS

Private Banks
Leading Firms
Bank of Montreal Private Banking
CIBC Private Wealth Management
Cidel *
RBC Wealth Management
Scotia Wealth Management
TD Wealth Private Wealth Management

* *Indicates firm with profile.*

Bank of Montreal Private Banking

Bank of Montreal offers its high net worth clients a full range of private wealth and banking services, such as assisting with personal banking, trusts and estates matters, investments and philanthropic giving.

"They are excellent at what they do," comments a market insider, with another adding: *"They have a lot of experienced, capable people."* One private client lawyer agrees: *"The people are very well experienced and therefore it's a joy to work with them. They know what is important and what's not."*

CIBC Private Wealth Management

CIBC Private Wealth Management is a *"big player"* in the market with a well-recognised, *"good private wealth group."* One source particularly notes: *"They have a great group of people in trust services. They are excellent and know what they are doing."*

Market insiders confirm CIBC is an *"important player in the Canadian domestic marketplace,"* as well as explaining that the bank is *"focusing international efforts into the US and other jurisdictions."*

Cidel

See profile on p.71

Cidel has quickly built a strong reputation in the private banking market. A source notes: *"It is a great organisation. They take the fiduciary services very seriously, they have a very strong team and are very consistent. They are small and private and this is their primary focus so they give it the attention it deserves."*

One market insider explains: *"They are much more flexible in developing products and in accommodating clients' needs. They are a bit leaner than bigger banks and have a more entrepreneurial approach in many respects. They have an approach of just trying to get the right results for clients by doing something more creative."* Another adds: *"They are very good at implementing structures. You get very much bespoke advice from them."*

RBC Wealth Management

RBC Wealth Management has a well-established reputation in the market. *"They have been very committed to this practice. From a private wealth perspective, they have just devoted a huge amount of resources to building up a practice in this space,"* says a market insider. Another comments: *"They would be the strongest, they are the behemoth. Of the banks, they are the best, they have the broadest offering and can bring a lot of services to bear."*

The bank is also praised for its international offering: *"Traditionally they have had the most extensive network internationally, a more experienced network. They have particular expertise in offshore jurisdictions like Hong Kong, Jersey and Guernsey."* The team is noted for being *"very attentive and very helpful,"* with the source adding: *"They come up with solutions and their service-oriented treatment is impressive."*

Scotia Wealth Management

Scotia Wealth Management is highly regarded across the Canadian market for its private wealth offering. One market insider especially praises its Vancouver office, saying that *"they've got a very strong trust group,"* and *"they take it quite seriously."* The source further praises the *"focus they put on fiduciary services and strength of their team,"* describing the team as *"strong and consistent."*

Scotia has the *"biggest depth of trust officers with depth of experience. They are all excellent there,"* says a source. One private client lawyer adds: *"They would be first call on trustee side. They are easiest to deal with and understand when things aren't cookie-cutter. They offer a high-quality service."*

TD Wealth Private Wealth Management

TD Wealth Private Wealth Management offers its high net worth clients a range of private banking services as well as assisting with trust and estate planning and family business successions. A market insider confirms: *"They are great, they have a very strong trust company. They have a very solid group and some pretty high-profile private banking clients."* Another adds: *"They are conscientious and try to get the best job done for beneficiaries."*

One interviewee comments on the bank's offering, explaining: *"Domestically they are very strong, it is a very powerful entity in the domestic scene. They have very good connections and have been very successful in penetrating into the US marketplace. They are a good player domestically and on cross-border work with the US."*

Leaders' Profiles in Canada

COHEN, Brian
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Featured in Private Wealth Law (Canada)

Practice Areas: Based in Toronto, he assists clients in the areas of estate planning, trusts and personal taxation, with a focus on advising high net worth individuals on succession planning alternatives. In addition, Brian frequently advises clients on estate litigation matters. Brian also advises donors, charitable organizations, public and private foundations, and not-for-profit organizations regarding the tax implications of formation, registration, governance and planned giving strategies. Brian a frequently sought presenter for many associations including, STEP, the OBA, the Law Society of Ontario and Osgoode Hall Law School Continuing Education. He is a past recipient of the Ontario Bar Association's Hoffstein Book Prize in Trusts and Estates. He is consistently recognized as a leading lawyer in legal directories such as Chambers Canada, Best Lawyers in Canada, Acritas Stars and the Canadian Legal Lexpert Directory.

Career: Brian was called to the Ontario Bar in 1999 after obtaining his LL.B. at Osgoode Hall Law School.

Professional Memberships: • Society of Trust and Estate Practitioners (STEP) Canada and director of the STEP Canada board • Professional Advisory Committee (PAC) of the Jewish Foundation of Toronto • Canadian Tax Foundation • Ontario Bar Association

EDNEY, James
Blaney McMurtry LLP, Toronto
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Featured in Family/Matrimonial (Canada)

Practice Areas: Jim Edney is a Family Law Lawyer who is focused on sensible, timely and effective resolution of contentious and complex financial disputes, including Support Claims and Property Claims relating to family trusts, business valuation, income determination and offshore assets. Jim is a Certified Specialist in Family Law (Law Society of Ontario) with experience in all resolution modalities including negotiated settlements, mediations and arbitrations, motions and trials. Often retained when prior counsel have failed to conclude a matter due to complex financial issues, inter-vivos trusts, death of a spouse or complex evidentiary issues.

Career: Called to the Bar of Ontario, 1993

LOBL, David
Gowling WLG (Canada) LLP, Toronto
+141 6862 5718
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Featured in Private Wealth Law (Canada)
Practice Areas: David is a litigation lawyer in Gowling WLG's global Private Client Services Group. His practice focuses on litigious estate, trust and capacity matters, including estate administration, fiduciary, estate and capacity litigation and alternative dispute resolution. Recognized for his trusts and estates expertise by the Canadian Legal Lexpert Directory and Best Lawyers in Canada, David represents trust companies, government agencies, estate trustees, trustees, guardians of property, attorneys for property, and other individuals in matters involving: •Contested passing of accounts •Estate Administration •International Multi-jurisdictional fiduciary litigation •Validity of wills •Breach of trust actions •Estate claims •Will interpretations •Dependant support claims •Trustee disputes •Variation of trusts As preferred counsel for LawPRO, David acts on matters of professional negligence with respect to estate and trust issues, including defending solicitor negligence claims and working with the Canada Revenue Agency in matters involving voluntary disclosures under the Income Tax Act and rectifications/repairs to defective wills and trusts. David has experience in both trial and appellate litigation, and has appeared before the Ontario Superior Court of Justice (including Estates and Commercial Lists), as well as the Divisional Court and the Ontario Court of Appeal.
Career: Ontario Bar, 2006

PIAFSKY, Judy
Blaney McMurtry LLP, Toronto
Featured in Family/Matrimonial (Canada)
Practice Areas: Judy is highly skilled in dealing with high conflict family law cases. Her practice encompasses all areas of family law including, property division, tax, complex income issues, corporate issues and parenting. Judy regularly appears before all levels of court in Ontario. She is involved in all facets of alternative dispute resolution, including negotiation, mediation and arbitration. Judy is also a trained Collaborative family law lawyer.
Career: Called to the Bar of Ontario, 2002

RABINOWITZ, Archie
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Featured in Private Wealth Law (Canada)
Practice Areas: With extensive trial and appellate experience in fiduciary litigation, Archie represents trust companies, government agencies and individuals in matters involving: •International Multi Jurisdictional fiduciary litigation •Breach of trust actions, unjust enrichment and equitable remedies •Undue influence claims •Interpretation & rectification of wills •Appointment or removal of trustees, protectors, personal representatives, attorneys & guardians •Contested Applications to Pass Fiduciary accounts •Validity of wills and Offshore, Alter Ego and Discretionary Trusts Archie is LawPRO preferred counsel on professional negligence claims arising out of estate matters. Consistently recognized as a leading lawyer in directories such as Chambers Canada, Best Lawyers in Canada and the Canadian Legal Lexpert Directory, Archie is a past recipient of the Ontario Bar Association's Award of Excellence in Trusts and Estates, as well as its Widdifield Award.
Career: Ontario Bar, 1984
Professional Memberships: He speaks and publishes frequently on the subject of estates and trusts law, and has co-chaired the Law Society of Upper Canada's prestigious Annual Summit on Trusts and Estates.

RINTOUL, Margaret
Blaney McMurtry LLP, Toronto
416 593 2931
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Featured in Private Wealth Law (Canada)
Practice Areas: Specialized work in complex, high-conflict family estate and guardianship situations, international estate administration matters, and difficult estate planning scenarios. Over 40 years of specialized work experience in estate planning, litigation and administration, adult guardianship and power of attorney matters. Recipient of the 2018 Ontario Bar Association Award of Excellence in Trusts and Estates Law. Author of leading texts: Ontario Estate Administration; Practitioners Guide to Estate Practice, 6th Edition; and Canadian Forms & Precedents – Wills and Estates (LexisNexis Canada).
Career: Called to the Bar of Ontario, 1978; LL.B., University of Western Ontario; Stitt Feld Hendy Certificate in Mediation, University of Windsor
Professional Memberships: Law Society of Ontario; Society of Trust and Estates Practitioners; Estate Planning Council Toronto

ROTH, Elie
Davies Ward Phillips & Vineberg LLP, Toronto
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Featured in Private Wealth Law (Canada)
Practice Areas: Elie is a tax partner concentrating on all aspects of private client practice, including advising on domestic and international tax planning, trusts and estates, and corporate reorganisations. He also acts as counsel to charities and non-profit organisations. He advises clients on cross-border transactions, structuring non-resident investment into Canada and outbound investments by Canadian residents. Elie represents taxpayers in disputes with the Canada Revenue Agency and provincial taxation authorities, including tax litigation matters. An adjunct professor of law at Osgoode, Elie teaches international taxation and taxation of real estate transactions. He speaks frequently at legal conferences on taxation issues.

RUDICK, Rhonda
Davies Ward Phillips & Vineberg LLP, Montréal
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Featured in Private Wealth Law (Canada)
Practice Areas: Rhonda is a partner in Davies' Private Client and Tax practices. She has extensive experience working with high-net-worth individuals, for whom she provides strategic, personalised estate and tax-planning advice with particular expertise in cross-border tax matters. She also counsels both Canadian and international clients on the tax aspects of mergers and acquisitions, financings, corporate reorganisations and real estate investments. Rhonda is a frequent speaker and is a co-lecturer at McGill University Faculty of Law's International Tax Course and Advanced Tax Seminar.

STEVENS, David
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Featured in Private Wealth Law (Canada)
Practice Areas: David Stevens is a partner in the business law department in the Gowling WLG Toronto office. David is a tax lawyer, focusing on corporate and international tax planning, personal and private company tax planning, trust taxation, charities and not-for-profits, and mining. David's clients include high net worth individuals and their families, registered charities, not-for-profit organizations, and trust companies. David advises clients on business succession planning, estate planning and estate administration, family trusts, reorganizations and mergers, offshore planning, private foundations, charities compliance, and outbound and inbound international tax planning. David is consistently recognized in top legal directories such as The Canadian Legal Lexpert Directory and the Best Lawyers in Canada.
Career: Ontario Bar, 1982

YOUDAN, Tim
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Featured in Private Wealth Law (Canada)
Practice Areas: Tim is a partner in Davies' Private Client practice, with extensive experience in all aspects of trusts and estates work, from planning to litigation. He regularly advises on the establishment and administration of domestic and international trusts, both personal and commercial. He advises domestic and foreign-based private clients, institutions (including trust companies and charities) and law firms. He also acts as counsel in estates and trusts litigation.
Professional Memberships: Past president, International Academy of Estate and Trust Law; Canadian Bar Association; Canadian Tax Foundation; Society of Trust and Estate Practitioners; Fellow, American College of Trust & Estate Counsel.

CIDEL

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CEO: Craig Rimer
President: Henry Perren
Number of lawyers: 1
Languages: *English*

Firm Overview:

Cidel founded in 1999 is an international financial services group that designs and implements customized financial solutions to help clients build, preserve and transfer wealth. With operations headquartered in Canada. Cidel's range of investment, trust and structuring capabilities provide clients with solutions that are transparent and global.

In the world of private banking, Cidel is recognized as a dedicated, high caliber bank and trust company with exceptional long-standing relationships.

The Cidel philosophy rests on four principles:

- Structure is the foundation upon which wealth is preserved and built
- A customized wealth management plan is the blueprint for the successful achievement of client goals
- The right investment strategy finds an appropriate balance between risk and return
- A productive and sustainable relationship is built on trust, transparency and respect

Cidel's clients come from around the world looking to solve a fundamental yet common problem – to simplify the complexity that comes from wealth. Cidel partners with them to:

- Protect their wealth to meet life goals like legacy or independence
- Increase their wealth beyond taxes, inflation, and fees
- Smoothly transfer their wealth to future generations
- Fulfill their philanthropic goals

Cidel is a private bank that acts like an individual – big capabilities delivered on a human scale.

Main Areas of Practice:

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PRACTICE AREAS

Asset Management
Trust Services
Philanthropy
Planning, Structure & Trust
Corporate Services

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MILLER THOMSON LLP

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Chairman: Kent Davidson, QC
Number of managing partners: 12 Number of partners: 337 Number of lawyers: 566
Languages: *Legal professionals are fluent in more than 20 languages including Cantonese, English, French, Mandarin, Portuguese, Spanish.*

Firm Overview:
Miller Thomson is one of Canada's leading national business law firms, offering a complete range of legal services. With more than 550 lawyers based in 12 offices across the country, the firm has a broader geographic reach than any other Canadian law firm.

Locations:
Miller Thomson's offices across Canada include locations in Vancouver, Calgary, Edmonton, Saskatoon, Regina, London, Kitchener-Waterloo, Guelph, Toronto, Vaughan, Markham and Montreal. They uniquely position the firm to provide 'on the ground' insight and knowledge of the country's key economic hubs, and under both the common law and civil law systems.

Main Areas of Practice:

Private Client Services:
21 partners; 22 fee earners based in 12 offices across Canada.

The firm's private client services (PCS) practice, one of the largest and most prominent in Canada, specialises in the day-to-day and long-term planning needs of many of Canada's most successful private family enterprises and individuals. The firm provide clients with a complete range of services with respect to estate planning, personal and related corporate tax, business succession planning, trusts, estate administration, trust and estate litigation and incapacity and elder law.

The PCS group distinguishes itself through its cornerstone publication, *Miller Thomson on Estate Planning* ('MTEP') — a preeminent Canadian publication on estate planning. Published by Thomson Reuters, *MTEP* is a two-volume, 20 chapter publication, covering a broad range of tax and estate planning topics in Canada as well as United States cross-border estate planning. *MTEP* is regularly updated and marks a truly collaborative effort by PCS lawyers across Canada.

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