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# Robins Appleby & Taub

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BARRISTERS/SOLICITORS

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## Estate Services

Our skilled practitioners have extensive experience:

- drafting sophisticated wills, powers of attorney, living wills, family trusts and alter ego trusts
- designing and implementing succession plans that facilitate a smooth transition of family business assets to the next generation
- advising on and drafting shareholders' and partnership agreements;
- resolving family disputes
- structuring estate plans that minimize income tax and probate tax arising on death
- implementing estate freezes
- drafting domestic agreements, including cohabitation and marriage contracts
- creating charitable corporations and trusts for philanthropic purposes
- advising on charitable giving

## Estate Administration

We manage all phases of estate administration with expertise and sensitivity:

- acting as estate trustees
- ascertaining the assets of the deceased
- discharging liabilities and paying necessary taxes
- structuring, when appropriate, post-mortem planning to minimize taxes and maximize returns to the estate and its beneficiaries
- dealing with financial institutions
- distributing property to beneficiaries
- applying to the court for the Certificate of Appointment of Estate Trustee

## Charities and Not-for-Profits

As long-time legal advisors to numerous local and national charities, we have expertise in:

- establishing and incorporating charitable trusts and corporations, both provincially and federally, whether as private family foundations or public institutions
- advising on planned giving, on behalf of both institutions and clients who have made significant donations to charitable and educational institutions in Canada and throughout the world
- making submissions to governmental authorities on behalf of charities
- representing clients who designate cultural gifts to the Canadian Cultural Property Export Review Board

## Counsel to Professional Advisors

We provide comprehensive estate and succession planning support to other professionals to help them assist their own clients. Our professional clientele include:

- accounting firms
- boutique law firms focused on family, immigration and criminal law
- insurance and financial planners

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