

# WILLS & ESTATES



## WHAT WE DO

- Will Planning and Drafting
- Tax and Estate Planning
- Inter-vivos and Testamentary Trust Planning
- Tax-Driven Reorganizations and Planning
- Post Mortem Tax Strategies
- Business Succession Planning
- Cross-border Tax and Estate Issues
- Powers of Attorney for Property
- Powers of Attorney for Personal Care
- Health Care Directives
- Estate Administration
- Estate Litigation and Alternative Dispute Resolution
- Charitable Giving

## WHY DEVRY SMITH FRANK *LLP*?

### We are experienced

A properly planned will is extremely important — it can ensure that you are able to clearly communicate your wishes and structure your affairs during your lifetime and after death in accordance with your wishes. This avoids confusion or misunderstanding among family members and friends after your death as to your intentions. A will only takes effect upon your death, therefore, it is equally important that you have valid Powers of Attorney for Property and Personal Care in place so that you can authorize persons to make decisions on your behalf and assist you in dealing with your property and your healthcare if you are unable to provide instruction or make decisions. Your Attorney must act in your best interest and in accordance with the law. The lawyers in our Wills & Estates Group have extensive experience advising clients in the complete range of legal services related to estate planning, estate administration, and estate litigation. As a full-service firm, we work with our Business, Tax, Real Estate, Not-For-Profit & Charities, and Family law groups to ensure that our clients' legal and family interests are protected and their goals achieved.

### We have a mid-market focus

Everyone needs a solid succession plan in place — individuals and businesses. We have particular expertise and experience representing entrepreneurs, owner-managers, mid-market businesses and their shareholders. We provide creative, tax-efficient and cost-effective solutions to assist family business owners with their succession planning. We work closely with the client's existing advisors, whether accountants, financial advisors, in-house legal counsel, tax and accounting departments, to develop and implement the appropriate strategy. If and when your situation changes, we will adjust your succession plan accordingly.

### We are lean

As a mid-sized law firm, Devry Smith Frank *LLP* balances professional, knowledgeable and customized legal solutions with a focus on delivering value. We are large enough to handle the most complex estates matters, but have an overhead structure and the flexibility to be cost effective. We are driven to deliver value to our clients in all that we do. Wills and Powers of Attorney are the cornerstone of your estate plan and should be signed only after careful consideration and legal advice.

To learn more about our Wills & Estates Law Group, please visit  
<https://devrylaw.ca/wills-and-estates/>



EXPERIENCED



PROFESSIONAL



RELIABLE

## ABOUT US

Devry Smith Frank *LLP* has advised and advocated for corporations, individuals and small businesses since 1964. We are a mid-size firm with a reputation for being approachable, professional and practical. Our rapid growth reflects client confidence — confidence we have built one client at a time.

We advise publicly traded financial institutions, emerging private companies, and the nimblest of start-ups. We act as personal counsel to individuals and families on a wide variety of legal needs. Our expertise spans industries as diverse as financial services, insurance, real estate and land development, service companies, professional services, technology, mining, and not for profits.



DEVRY SMITH FRANK *LLP*  
LAWYERS & MEDIATORS

Toronto  
Barrie  
Whitby  
Bowmanville  
Haliburton  
Innisfil  
Stouffville



## DEVRY SMITH FRANK *LLP*

Lawyers & Mediators

[www.devrylaw.ca](http://www.devrylaw.ca)

Devry Smith Frank *LLP* - Toronto  
95 Barber Greene Road #100,  
Toronto, Ontario M3C 3E9

Devry Smith Frank *LLP* - Barrie  
85 Bayfield Street 3rd floor,  
Barrie, Ontario L4M 3A7

Devry Smith Frank *LLP* - Whitby  
209 Dundas Street East #401,  
Whitby, Ontario L1N 7H8

Devry Smith Frank *LLP* - Bowmanville  
29 Scugog Street,  
Bowmanville, Ontario L1C 3H7

Woitzik Polsinelli *LLP* - Whitby  
619 Brock Street South,  
Whitby, Ontario L1N 4L1

Woitzik Polsinelli *LLP* - Stouffville  
20 Freel Lane, Unit 9 Second floor,  
Stouffville, Ontario L4A 8B9

Devry Smith Frank *LLP* - Innisfil  
1000 Innisfil Beach Road,  
Innisfil, Ontario L9S 2B5

Devry Smith Frank *LLP* - Haliburton  
83 Maple Avenue, Unit 8C,  
Haliburton, Ontario K0M 2B0