

SERVICE

Private Client Taxation

Clients benefit from our expertise on all tax aspects of wealth preservation, business succession planning and estate planning.



Related Expertise

- Private Client
- Tax

Osler provides guidance on all tax aspects of wealth preservation, business succession planning and estate planning, including limiting taxes payable at death, last will and testament planning, using life insurance to pay obligations of the estate, establishing private foundations for charitable giving, creating *inter vivos* trusts, and administering estates and trusts.

Our team also advises on cross-border tax planning in connection with trust structures, emigration from Canada and departure tax, tax residence issues, and estate freezes.

The full scope of our tax planning expertise includes designing tax efficient structures and negotiating domestic and international transactions, including mergers, acquisitions, divestitures, joint ventures, equity investments, debt financings, real estate investments and all ranges of business ventures and transactions. Osler is a leader in corporate tax planning and cross-border taxation issues. Our firm also has deep Canadian and international expertise in capital markets, advising private equity funds and their investors, and structuring investments in mutual funds, ETFs, pension funds, and sovereign wealth funds. Our tax lawyers are integral to the successful structuring of our private clients' assets and estates and associated business succession and estate planning. They focus on:

Developing innovative and tax efficient structures

Our team takes into consideration multijurisdictional property, family or business interests.

Customized tax planning

Achieving our clients' objectives while minimizing the tax burden is our focus. Guidance is also provided on all tax aspects of wealth preservation, business succession planning and estate planning, including limiting taxes payable at death, last will and testament planning, using life insurance to pay obligations of the estate, establishing private foundations for charitable giving, creating inter vivos trusts, and administering estates and trusts. Osler tax experts also advise on cross-border tax planning in connection with trust structures, emigration from Canada and departure tax, tax residence issues, and estate freezes.

Managing tax risks

Our team ensures there is no undue risk or increase to our client's existing risk profile. Osler anticipates and handles scrutiny of our private clients by tax authorities and mitigates the potential consequences of that scrutiny (such as assessments/audits and possible additional payments, disputes and litigation).

Audits of tax structures by the CRA and provincial tax authorities are defended, and our team keeps abreast of all relevant tax legislation, regulations and treaties to ensure compliance, and identify planning opportunities.

Transaction agreements

Osler drafts and negotiates tax aspects of transaction agreements and other liquidity events while undertaking related due diligence;

No other firm rivals the range and depth of our taxation subject matter expertise, and our development of novel, tax efficient structures allows us to provide unparalleled insight into issues for potential investors.

Key Contacts



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Awards and Recognition

- **Chambers Canada: Canada's Leading Lawyers for Business:** Recognized in Tax (Band 1)
 - "Osler team brings a wealth of experience, and is methodical and strategic with their approach to complex and sophisticated matters."
 - "The depth of the team is unbelievable."
 - "Osler is technically strong. They are also commercial and will take a view supported by reasoned and principled judgement in areas with no clear answer. I am very happy with their advice."
- **Chambers Global: The World's Leading Lawyers for Business:** Recognized in Tax (Band

1)

- *"They have an exceptionally strong team that works together seamlessly – their experience with tax and tax litigation is the best in Canada."*