WILLS & ESTATES

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Our lawyers can help ensure that the assets you have carefully built are preserved, protected and passed on in the way you intend.

Planning wills and estates includes consideration of a wide range of personal, family and legal issues.

Our lawyers can help you set up wills, estates, trusts and other tools that help you preserve wealth and shift it to your beneficiaries in the way you want. At the same time, we'll advise you of the laws and systems that could have an impact.

Your entire estate is carefully considered, including family businesses, large real estate holdings, income properties, trusts, charitable entities, pension funds and insurance strategies to provide a comprehensive view of all your options.

PRACTICE AREAS

We offer guidance in the following areas:

- Wills & Trusts
- Probate & Estate Administration
- Estate Planning & Wealth Preservation
- Estate Litigation

SERVICES

- Advising on and preparing wills and enduring power of attorney instruments
- Developing comprehensive strategies to minimize taxes and probate fees
- Inter-generational family wealth planning
- Assisting with estate freezes and the implementation of trusts
- Advising clients about marriage agreements as part of their estate planning
- Assisting clients in second-marriage situations to set up alter ego/joint partner trusts to deal with potential wills variation concerns
- Advising clients on the enhanced legal status of common-law partners, which can have an impact on family situations that were not previously affected
- Drafting representation agreements for highly acrimonious family situations
- Arranging transfer of assets through living or inter-vivos arrangements
- Ensuring that you or your family members have plans in place to deal with the possibility of a temporary or permanent incapacity
- Assisting individual executors and trust company professionals in all areas of estate administration
- Working with married, common-law and same-sex couples to determine legal rights and obligations relating to insurance and pension benefits
- Recording and storing all documents in a fireproof room where they will be kept safe
- Creating wealth planning solutions that incorporate clients' business interests

- Working closely with your other professional advisors, such as your accountant and financial advisor

TYPICAL SITUATIONS

- A business owner wants to ensure that the wealth he has built is maximized when he leaves it to his heirs and that taxes and probate fees are minimized
- A community leader decides to leave a significant amount of her estate to her favourite charity so she can leave a legacy that will benefit hundreds of people, and she wants to set up a trust to manage the funds
- A parent is diagnosed with early-onset dementia. He and his children decide that a lasting power of attorney should help as his illness progresses
- A couple who have built up their wealth together want to ensure that the wealth is protected and preserved for their children and the surviving spouse in case of the premature death of one of them

RECOGNITIONS

Harper Grey receives the TAGLaw Membership Award of Distinction acknowledging 15 years of outstanding service

18 Harper Grey lawyers recognized as "Leading Practitioners" by Canadian Legal Lexpert Directory®, 2017

Martindale Hubbell® recognizes 13 Harper Grey lawyers across 27 practice areas

24 Harper Grey lawyers recognized across 15 specialty areas by Best Lawyers® in Canada, 2017

Harper Grey recognized as a Top 10 Regional Firm in British Columbia, Alberta and the Territories by Canadian Lawyer Magazine, 2012 and 2014

COMMENTARIES

"These lawyers are all subject matter experts, and leader in their field, whose knowledge and skill are matched by their excellent client service."
— Benchmark Canada® 2019

"They exceeded my expectations. I am very satisfied with their work and very happy to recommend them."
— Chambers Canada® 2017

"Harper Grey is one of the best firms in Vancouver. They have excellent service, knowledge and their cost structure is excellent."
— Benchmark Canada® 2017

"Harper Grey has niches, and in those niches they are the best of the best."
— Benchmark Canada® 2017

"The firm has real quality people, and they've put three people on the bench there in six years."
— Benchmark Canada® 2015

"Harper Grey lawyers are 'dedicated to their clients and focused on finding and implementing practical solutions for them. The lawyers are prompt, intelligent and insightful, and provide a high level of customer service'."
— 2012 Canadian Lawyer Magazine® Embracing Regionalism - Canadian Lawyer's Top 10 firms from B.C., Alberta, and the Territories are in the Sweet Spot Right Now, October 1, 2012

“Harper Grey has a stellar pedigree as a litigation firm, and they’ve put a ton of people on the bench, observes one peer.”
— Benchmark Canada® 2014

“Every day it seems like I am dealing with someone at Harper Grey, and I always find them professional, courteous and effective.”
— Benchmark Canada® 2017

“Clients are comforted by the firm’s long history in BC. We’re steeped in the region. Our connection is such that we have knowledge of not only the issue itself, but the history of the issue in the province.” – Richard Bereti
— 2012 Canadian Lawyer Magazine® Embracing Regionalism - Canadian Lawyer's Top 10 firms from B.C., Alberta, and the Territories are in the Sweet Spot Right Now

“A Vancouver staple, Harper Grey is perhaps the most BC-centric of the “highly recommended” firms, owing largely to the firm’s bench strength in several key areas.”
— Benchmark Canada® 2017

“A lawyer who refers work to Harper Grey wrote it has ‘great service, a breadth of practice and I have never received a negative comment from referrals to the firm’.”
— 2014 Canadian Lawyer Magazine® Stronger than Ever - Top Western & Northern Firms, September 1, 2014

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SELECT ARTICLES + PUBLICATIONS

“Ethics for Trust and Estate Practitioners: Managing Conflicts of Interest” Article
Published In: CBABC BarTalk Magazine - Apr.15
Written by: Roselle P. Wu

SELECT EVENTS + PRESENTATIONS

Michael Drouillard and Sandra Abley to attend 2018 Manufactured Home Park Owners Alliance of British Columbia AGM
Presentation date: 21.Sept.18
Presented by: Michael Drouillard, Sandra Abley, JD, CFP®, TEP

Erin Hatch to present a case comment on the recent decision in “Cooper-Smith v. Morgan” at CBABC Wills and Trusts Section Meeting
Presentation Date: 27.Feb.18
Presented by: Erin Hatch

Erin Hatch will be presenting a case comment at upcoming CBABC Vancouver Wills and Trusts Section meeting
Presentation Date: 12.Apr.16
Presented by: Erin Hatch

Bill MacRae presents Wills & Estates Seminar to WOWRide’s Cycling Club
Presentation Date: 7.Oct.15
Presented by: William D. MacRae*

SELECT NEWS

Sandra Abley elected as Chair of the CBA Wills & Estates Subsection
Related to: Sandra Abley, JD, CFP®, TEP - 05.Sep.18

Sandra Abley and Erin Hatch to be interviewed on Fairchild Radio
Related to: Sandra Abley, JD, CFP®, TEP, Erin Hatch - 30.Aug.18

Sandy Abley and Bill MacRae Support Make A Will Week
Related to: Sandra Abley, JD, CFP®, TEP, William D. MacRae* - 27.Mar.18

Harper Grey warmly welcomes four new partners
Related to: Prentice Durbin*, Una Radoja*, Roselle P. Wu, Kim J. Yee - 18.Jan.18

Sandra Abley quoted in Advisor.ca article
Published by: Advisor.ca - 14.Nov.17
Related to: Sandra Abley, JD, CFP®, TEP - 17.Nov.17

Sandra Abley appointed Vice-Chair of the CBA Wills & Trusts Subsection
Related to: Sandra Abley, JD, CFP®, TEP - 24.Jul.17

16 Harper Grey lawyers recognized for litigation expertise by Benchmark Canada® 2017
Related to: H. Roderick Anderson*, Bryan G. Baynham, QC, Salman Y. Bhura*, Guy P. Brown, QC*, Karen F. Douglas*, Kimberly J. Jakeman*, James M. Lepp, QC, Barbara J. Norell, QC, Terrence L. Robertson, QC, Christopher M. Rusnak*, John P. Sullivan*, Michael G. Thomas*, Nigel L. Trevethan*, Abigail C.F. Turner*, Jennifer R. Woznesensky, Jonathan D. Meadows* - 11.May.17

Harper Grey welcomes Sandra Abley, JD, CFP ®, TEP as Associate Counsel
Related to: Sandra Abley, JD, CFP®, TEP - 21.Apr.17

Martindale-Hubbell® recognizes 14 Harper Grey lawyers
Related to: Bryan G. Baynham, QC, John B. Brown*, Guy P. Brown, QC*, Karen F. Douglas*, Steven G. Lukas*, Maureen L.A. Lundell, QC, William D. MacRae*, L. Neil Matheson, QC*, Barbara J. Norell, QC, David W. Pilley, Terrence L. Robertson, QC, Abigail C.F. Turner*, Henning W. Wiebach* - 30.Jan.17

Roselle Wu appointed Chair of the CBABC Wills and Trusts Section
Related to: Roselle P. Wu - 01.Sep.15

Michael Brown joins Harper Grey's Business Law and Wills & Estates Groups
Related to: Michael Brown - 26.Jun.15

SELECT NEWSLETTERS + UPDATES

In Trust Accounts: the Good, the Bad and the Ugly
Published In: Estate Planning And Wealth Preservation Update
Written by: Sandra Abley, JD, CFP®, TEP

Enduring Power of Attorney Agreements
Published in: Estate Planning and Wealth Preservation Update: 25.Sept.18
Written by: Sandra Abley, JD, CFP®, TEP

Estate Litigation Primer: Wills Variation Overview
Published in: Estate Planning and Wealth Preservation update Update - 01.May.18
Written by: Sandra Abley, JD, CFP®, TEP, Erin Hatch

Planning for Medical Assistance in Dying
Published in: Estate Planning and Wealth Preservation Update - 08.Mar.17
Written by: Sandra Abley, JD, CFP®, TEP, Dionne H. Liu

Do Not Delay, Sometimes It Can Be Too Late
Published in: Estate Planning and Wealth Preservation Update - 25.Jan.18
Written by: Sandra Abley, JD, CFP®, TEP

The Financial Abuse of Seniors
Published In: Estate Planning & Wealth Preservation Update - 09.Nov.17
Written by: Sandra Abley, JD, CFP®, TEP, Roselle P. Wu

Protecting Gifts to Adult Children
Published in: Estate Planning & Wealth Preservation Update - 19. Sep.17
Written by: Sandra Abley, JD, CFP®, TEP, Maureen L.A. Lundell, QC

What Are Probate Fees & Should You Try To Avoid Them?
Published in: Estate Planning and Wealth Preservation Update - 05.Jul.17
Written by: Sandra Abley, JD, CFP®, TEP

Executor held Financially Responsible for the Mismanagement of an Estate
Published in: Estate Planning and Wealth Preservation Update - 01.May.17
Written by: Sandra Abley, JD, CFP®, TEP