



## Polly Storey

Partner

Estates & Trusts Opinions and Appeals  
Estates & Trusts  
Elder Law

604 891 7745  
[pstorey@cwilson.com](mailto:pstorey@cwilson.com)

### Profile

Polly is a partner practicing in the areas of Estates & Trusts and Elder Law. She regularly assists clients in resolving contentious estate, trust, and elder law issues involving significant and emotional personal matters, and with estate and incapacity planning to provide certainty and peace of mind for the future. She has appeared before the Courts in British Columbia and before the Supreme Court of Canada.

Polly excels in providing thorough and detailed analysis of complex legal issues. Her practice includes researching and drafting legal opinions, memoranda, and arguments on estates and trusts matters, which are relied on by clients and by counsel both within Clark Wilson and outside the firm. Having worked with multiple judges at the Court of Appeal, Polly is able to efficiently and effectively analyze the law underpinning the disputes her clients are facing to find a solution.

Polly recognizes and understands that the legal process can be overwhelming and intimidating, particularly for clients navigating the emotionally-charged issues raised by estate disputes and seeking to organize their affairs for the future. She works to identify her client's goals and to develop creative and practical strategies for realizing those objectives.

Polly's skills in legal research, writing, and analysis are such that she is a regular and sought-after contributor to legal publications including the Continuing Legal Education

Society's Annotated Estates Practice, Probate and Estate Administration Practice Manual, and Estate Planning and Wealth Preservation Practice Manual. She was also a contributing author to the British Columbia Estate Litigation text, providing comprehensive analysis of wills variation claims in British Columbia.

### **Estates and Trusts Services**

- > Committeeships
- > Capacity and undue influence litigation
- > Wills variation claims
- > Trust administration and beneficiary claims
- > Breach of fiduciary duty claims
- > Estate, trust, and incapacity planning
- > Legal research and opinions
- > Appellate practice

## **Credentials**

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### **Awards & Distinctions**

- > Society of Trust and Estate Practitioners (STEP) Private Client Awards finalist for Contentious Trusts and Estates Team of the Year 2021

### **Industry Involvement**

- > Canadian Bar Association, member, 2017 - Present
- > Law Society of British Columbia, member, 2017 - Present
- > The Continuing Legal Education Society of British Columbia, board member, 2023 - Present

### **Education & Call to Bar**

- > Call to Bar: British Columbia, 2017
- > Court of Appeal for British Columbia and Yukon Court of Appeal, Judicial Clerkship, 2016 - 2017
- > University of British Columbia, Bachelor of Laws, 2016
- > University of British Columbia, Bachelor of Arts, 2013

### **External Publications**

- > Beneficiary's Access to Trust Documents, Estates, Trusts & Pensions Journal, author, April 2024
- > Contributing author, Annotated Estates Practice 2024, The Continuing Legal Education Society of British Columbia, 2024
- > "A Modern Approach to Costs of Adult Guardianship Proceedings in British Columbia", Estates, Trusts & Pensions Journal, co-author, Thomson Reuters, December 2023
- > Court refuses to force capacity assessment on unwilling senior, interviewee, Advisor's Edge, March 14, 2023
- > "Case Comment: Fuller v. Fuller", Estates, Trusts & Pensions Journal (vol. 42, no. 2), author, Thomson Reuters, February 2023

- > "Adult Guardianship in BC", Estates, Trusts & Pensions Journal, co-author, Thomson Reuters, February 2023
- > "Financial Disclosure in Wills Variation Matters: Richter v. Richter Estate", Taxnet Pro, co-author, February 2023
- > Conscious of the Good Conscience Trust: Further Thoughts on the Constructive Trust in Wills Variation Claims, co-author, The Advocate, 2022
- > Binding the Will-Makers Conscience: Is it Time to Use the Good Conscience Substantive Trust in Wills Variation Cases?, co-author, The Advocate, 2022
- > Will Unsigned Because of COVID Deemed Valid, contributing author, The Lawyer's Daily, 2021
- > Better late than never: Giving effect to will-maker's intentions, part two, contributing author, The Lawyer's Daily, 2021
- > Better late than never: Giving effect to will-maker's intentions, part one, contributing author, The Lawyer's Daily, 2021
- > A Tale of Two Spouses: Boughton V. Widner Estate, contributing author, Canadian Bar Association
- > COVID-19 and the Curative Provision in WESA, S. 58: Bishop Estate V. Sheardown, 2021 BCSC 1571, contributing author, Canadian Bar Association
- > New ways to fix a will in B.C., contributing author, The Lawyer's Daily, 2021
- > In Sherman Estate decision, open court principle over privacy, part two, contributing author, The Lawyer's Daily, 2021
- > In Sherman Estate decision, open court principle over privacy, part one, contributing author, The Lawyer's Daily, 2021
- > Paying stiff price for breach of fiduciary duty, contributing author, The Lawyer's Daily, 2021
- > The doctrine of cy-près: Fulfilling a donor's wish, contributing author, The Lawyer's Daily, 2021
- > Basics, Trends, and Practice in Wills Variation, co-author, Continuing Legal Education Society of British Columbia, February 2021
- > British Columbia Estate Litigation, contributing author, LexisNexis, 2020
- > CLE British Columbia Probate and Estate Administration Practice Manual, Chapter 2, co-editor
- > CLE British Columbia Estate Planning and Wealth Preservation, Chapter 7, co-editor
- > CLE British Columbia Annotated Estates Practice, Chapters 16, 41, 44, co-editor
- > Ending the 'Marriage-Like' Relationship?, Canadian Family Law Matters newsletter, LexisNexis Canada, June 2019
- > Does 'Death Do Us Part'? Separating the Living from the Dead in Family Law and Estate Litigation, Money & Family Law, April 2019
- > Bouchard v. Bouchard - The Intersection of Estate Law and Family Law, Canadian Family Law Matters newsletter, LexisNexis Canada, December 2018