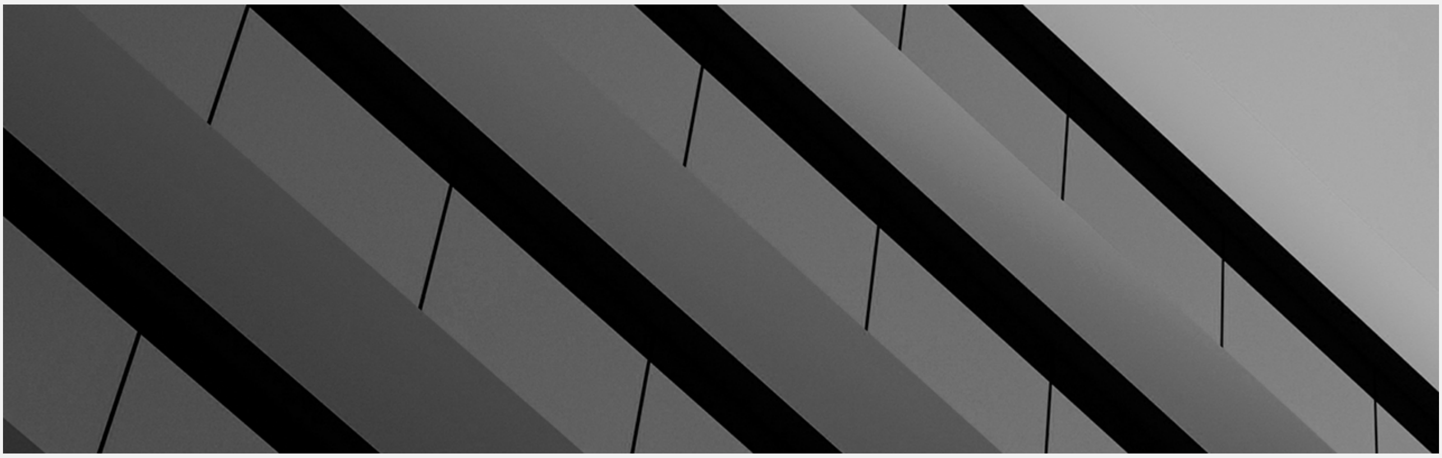

Family Office

Profile

Our Family Office group works with some of the wealthiest families and ultra-high-net-worth individuals in Canada and the world. We have the legal expertise to protect and grow family assets for current and future generations, and we do so discreetly and through a convenient single point of contact.

Wealth administration for families is as complex as it is robust. Family wealth spans beyond personally held assets and the business itself. They include real property, commercial interests, trusts, and other personal, corporate and trust holdings. It requires active and constant oversight to direct the day-to-day administration and management of a family's affairs and both their short and long-term strategies.

The onerous nature of performing all of these functions can be overwhelming, which is why individuals and families are increasingly turning to the expertise of our Family Office team to manage all legal aspects of their holdings and operations.

Our lawyers work with key family members and their other advisors in a coordinated fashion to understand each family's specific values and goals and to create a wealth maximization strategy. From shareholder assemblies to family gatherings, we offer professional facilitation services to help plan, guide and execute meetings to keep discussions focused and moving forward.

Such strategy can include personal services and protecting wealth through agreements, investing private capital and buying and selling businesses, charitable and philanthropic giving through purpose-formed charities, foundations and non-profits, the intergenerational transfer of wealth, estate planning and tax optimization.

Our clients benefit from our lawyers' expertise and connections across 35 practice areas in one cohesive team and do away with the need to rely on multiple third-party service providers. As a result, our clients gain access to holistic strategies and practical solutions based on their entire portfolio, all with greater privacy, by dealing with one firm.

Services

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Facilitation of Family Meetings

> We offer professional facilitation services to our clients to help plan, guide and execute productive discussions among family members as a neutral outside body. Facilitators set the group up for success through thoughtful preparation and meeting management protocols to set ground rules, ensure all voices are heard, mediate conflict, and keep conversations focused. This neutrality and consensus-building approach can help shift family dynamics to achieve better thinking, more fulsome solutions to problems, and greater support for decisions. Our facilitation services are designed to create a safe and respectful space for family members to openly communicate, build deeper relationships, and achieve shared goals based on mutual understanding, respect and trust.

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Estates & Trusts

> We help clients protect and secure family wealth for generations to come through estate planning, representation agreements, committeeship and guardianship applications, estate freezes and family trusts, incapacity planning, international assets and trusts, cross-border considerations for non-resident beneficiaries, planning for disabled beneficiaries, and philanthropic giving.

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Tax

> We provide a broad range of individual and corporate tax planning and optimization strategies. This includes asset protection, intergenerational wealth, foreign tax and compliance, structured giving, mergers and acquisitions, audits and investigations.

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Private Equity Investing and Mergers and Acquisitions

> We have a dedicated team of professionals who focus on buying and selling businesses as well as private equity financing transactions, including preferred share investments. We offer comprehensive corporate legal services to ultra-high net worth individuals and families and family-owned businesses of all sizes operating in British Columbia and jurisdictions throughout the world. Our offerings include transaction advisory services such as general contract matters, structuring and restructuring, business succession planning, and corporate governance.

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Family Law

> Our team helps clients proactively and strategically navigate all aspects of family life, including cohabitation agreements, marriage agreements, surrogacy agreements, separation agreements, division of property and debt, and negotiated settlements.

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Charities, Foundations and Non-Profits

> We work closely with individuals and families to fulfill their philanthropic intentions. Our tax planning expertise and experience with complex regulatory landscapes ensure we provide clients with fulsome strategies to maximize their giving goals, including through private foundations, donor-advised funds and planned giving strategies.

Mediation & Arbitration

> Mediation and arbitration offer a private, time-efficient and cost-effective way of resolving issues including business matters, marital and cohabitation disputes, wills and estates matters, personal injury claims, and general and disability insurance.

Commercial Real Estate

> Widely recognized among British Columbia industry leaders as the first choice for handling real estate transactions, we help clients with raising capital and structuring ownership vehicles, buying and selling development lands, income properties and real estate-based operating businesses such as hotels and senior housing, and leasing services for residential, mixed-use, retail, office, industrial, land and master planned community developments.

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