

SERVICE

Investment Funds

We provide expert advice on a wide range of fund investment activities across all asset classes.



Related Expertise

- [Private Equity](#)
- [Private Funds](#)
- [Public Funds](#)
- [Securities Regulatory](#)
- [Venture Capital](#)
- [Venture Fund Formation](#)

Osler has decades of experience advising on fund investment activities to guide clients through the investment cycle from formation, product creation, structuring and sales, to operations, regulatory compliance and secondary transactions, as well as regulatory investigations and litigation.

Osler's leading team of experts, recognized with a Band 1 ranking in *Chambers Canada*, provides top-tier advice on all aspects of investment funds and asset management, private funds, private equity and fund formation, including venture capital fund formation.

Our firm is innovative in the Canadian investment fund industry and has advised on multiple landmark deals and first-of-its-kind structures. Our team has established relationships with the most prominent investment fund managers and investors in Canada and the United States. Our wide range of expertise includes the formation of ETFs, mutual funds, private equity funds, venture funds, private debt funds, pooled funds, hedge funds, infrastructure funds and real estate funds, representing investors of all types as they invest in such funds, as well as advising on related fund reorganization and M&A transactions. Strong deal flows and regular interaction with leading fund managers and investors keep us at the forefront of industry and market practice.

The firm's expertise positions us to advise on investment fund transactions across all asset classes, with the resources to execute on complex domestic and cross-border transactions. Our lawyers also advise on the registration, licencing and compliance requirements that dealers, advisers and investment fund managers must navigate to conduct business in this space. Osler's cross-disciplinary team includes leading securities regulatory, taxation and disputes lawyers to help our clients manage related risks and compliance.

Key Contacts



CO-CHAIR

[Andrew W. Aziz](#)

Partner, Corporate, Toronto



CO-CHAIR

[John Black](#)

Partner, Corporate, Toronto

Awards and Recognition

- **Chambers Canada: Canada's Leading Lawyers for Business:** Recognized in Investment Funds (Band 1); Investment Funds: Fund Formation (Band 1)
 - "The individual lawyers and their expertise have been a tremendous asset to us. They are extremely knowledgeable, particularly in the area of mutual funds."
 - "They understand our needs, risk profile, and conditions under which we operate. I have ultimate confidence that they are looking at the transaction in the same way as we are."
- **The Canadian Legal Lexpert Directory:** Recognized in Investment Funds & Asset Management (Toronto, Ontario; Montreal, Quebec)
- **Who's Who Legal:** Osler lawyers recognized in Private Funds