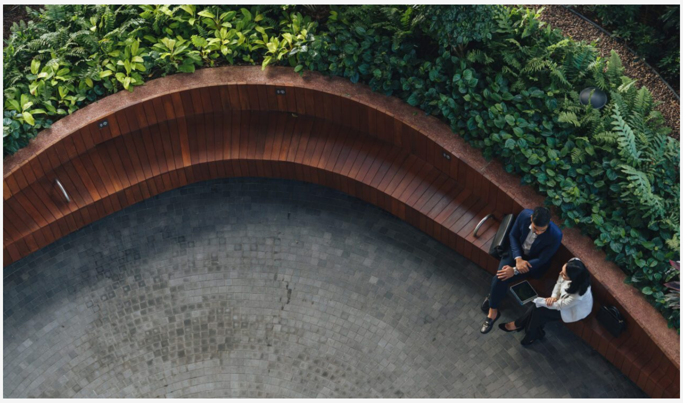
OSLER

SERVICE

Private Client

Osler's multi-disciplinary team provides insightful advice that positions our clients to plan effectively for the future.



Related Expertise

- Capital Markets
- Commercial Real Estate
- Corporate Governance
- Corporate Lending
- Emerging and High Growth Companies
- Mergers and Acquisitions
- Private Client Taxation
- Private Equity and Investment Fund Disputes
- Tax

Preserving, protecting and transferring wealth. Business succession planning. Developing tax-efficient investment strategies and structures. Leaving a lasting legacy. These are just some of the objectives pursued by private clients including high-net-worth individuals and executives, private business owners, private trust companies, family offices, and corporate and family foundations.

While articulating these short- and long-term goals may be straightforward, achieving them can be challenging, making the insight and advice of experienced professionals invaluable. With the right guidance, private clients can ensure that they protect and grow their assets while minimizing their tax burden, mitigating their litigation and other risks, and planning effectively for the future.

Osler's Private Client Group is particularly well-positioned to offer that kind of assistance. Leveraging our collaborative approach, our multidisciplinary team has the right combination of expertise to advise on the range of issues that private clients face.

A multidisciplinary solution that delivers results

By drawing on the knowledge and experience of professionals from across the firm, our lawyers provide guidance on the full spectrum of wealth management matters, from tailored, tax-efficient estate planning and business succession planning, to assessing investment opportunities and structuring domestic and international private equity, venture capital, hedge fund, real estate and corporate transactions.

Our multidisciplinary Private Client Group calls upon our market-leading expertise in Taxation, Private Equity, Corporate, Investment Funds, Emerging and High Growth Companies, and Real Estate law to provide the comprehensive advice required to create and administer individualized plans that will suit your specific needs while minimizing the tax burden. Our expertise includes:

- **Private Client Taxation:** Our tax planning lawyers are integral to the successful structuring of our private clients' assets, estates and associated business succession and estate planning. We focus on developing innovative and tax efficient structures for private clients; providing customized advice for trusts and wills; and drafting and negotiating tax aspects of all types of transaction agreements and other liquidity events. We help our private clients manage their tax risks; comply with complex tax rules affecting individuals, corporations, trusts and estates; anticipate and mitigate scrutiny by tax authorities; and defend tax audits. Our private clients benefit from the formidable expertise of Osler's tax controversies practice in the event of tax assessments, audits, disputes and litigation. Read more.

- **Private Equity:** With significant experience in fund formations and fund investment structures, we guide our private clients through the investment cycle. We frequently advise prominent players in the private equity sector including leading private equity sponsors, pension funds, venture capital funds, major corporations, institutions and growing private companies. Read more.
- **Corporate**: We advise on all manner of transactions (such as private M&A, corporate reorganizations to restructure the family business and assets, going public, direct investments, private equity transactions, financing and banking and corporate finance transactions) as well as fund formation, investment fund management and corporate governance. We also provide advice on the creation and operation of charities and not-for-profit corporations, and on a wide range of philanthropic endeavours.
- **Emerging and High Growth Companies:** We advise investors (both institutional and private), founders and various emerging and growth-stage companies operating in various sectors. We advise clients in connection with a variety of transactions including venture capital, growth equity and private equity financings, joint ventures, strategic alliances and exit transactions. Each year our team advises emerging companies and investors on billions of dollars' worth of venture capital financings. Read more.
- **Real Estate**: We act for a diverse roster of private and public-issuer clients on their strategic real estate investments and transactions. We advise on all aspects of investment strategies, whether it be direct investments or passive forms of investment. We also advise on how best to structure real estate investments including limited partnerships, co-ownerships and other real estate investment vehicles. Our real estate lawyers work closely with our tax lawyers to structure investments and possess both the technical savvy and practical knowledge to have earned a reputation of being successful negotiators and creative problem solvers. Read more.

Members of our team are trusted advisors and serve as Trustees of trusts and as Executors and Trustees of several estates and family trusts. Our lawyers regularly speak and write on the topic of personal tax and estate planning. One of our legal professionals is an Academician of the International Academy of Estate and Trust Law, an invitation-only organization that studies the substantive requirements and tax consequences of the transfer of wealth. Membership in the organization is highly selective and limited to lawyers who have distinguished themselves as thought leaders in this area.

Key Contacts

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Awards and Recognition

- **Chambers High Net Worth Legal Guide – Canada**: Recognized in Private Wealth Law
- **The Canadian Legal Lexpert Directory**: Recognized in Estate & Personal Tax Planning
- **Best Lawyers in Canada**: Recognized in Trusts and Estates
- **Who's Who Legal**: Private Client (International; Canada)