

Canadian Family Practice

Family Services - Canada

Our Canada-based Family Services group provides a one-stop shop for ultra-high net-worth families and individuals. We assist our clients with the full spectrum of legal needs that come with family wealth administration, including issues relating to real property, commercial interests, trusts, and other holdings, managing all legal aspects of the family's assets and operations. Our team coordinates with key family members and their financial advisors to create a wealth maximization strategy based on a nuanced understanding of the family's aspirations and values.

Our services include the following:

Family Law: We help 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.

High-Impact Communication: We serve as a neutral third party to help plan, facilitate, and execute high-impact discussions. Our services are focused on helping family members communicate fully and effectively, deepen their relationships, and identify and reach shared goals.

Trusts and Estates: We handle estate planning, estate freezes and family trusts, incapacity planning, representation agreements, committeeship and guardianship applications, international assets and trusts, cross-border considerations for nonresident beneficiaries, planning for disabled beneficiaries, and other such matters to help clients protect and secure intergenerational wealth.

Tax: We help our clients develop and implement tax planning and optimization strategies, including charitable giving and other philanthropic endeavors, intergenerational wealth, asset protection, foreign tax and compliance, and structured giving. We also assist clients who become the target of tax-related audits and investigations.

Corporate Advice and Counsel: We offer advice to individuals, families, and family-owned businesses in connection with a wide range of transactions, including those involving general contract matters, structuring and restructuring, business succession planning, corporate governance issues, and private equity investing, including preferred share investments.

Real Estate: We assist clients with the full spectrum of issues that can arise in connection with their commercial and residential real estate holdings.

Mediation, Arbitration, and Facilitation: We handle mediations and arbitrations and provide facilitation services to help our clients resolve a wide range of disputes in a private, time-efficient, and cost-effective manner.



Chantal Cattermole
Chair, Canadian Family Practice

ccattermole@cozen.com
Phone (236) 317-6892
Fax (604) 674-9245

Related Practice Areas

- Capital Markets & Securities — Canada
- Mergers & Acquisitions – Global