

## Wealth Management Firms Abbotsford

Wealth Management Firms Abbotsford - Our Wealth Preservation & Estate Litigation Practice assists clients with whichever matters very much affecting the interests of an estate, as well as the preservation and creation of wealth through estate planning, administration and litigation. Dealing with your concerns, and any additional problems which could affect the estate without your awareness, is our primary responsibility.

Our planning and litigation lawyers are knowledgeable at different levels to ensure that issues are handled cost-efficiently and quickly. They work closely together to address all matters which can arise to challenge your plan. Our planning litigation and planning services are based on thorough knowledge of the planning process to be able to offer a net benefit for our clients.

Our company represents various leading charities, providing our services in the incorporation of societies, the establishment of charitable foundations and trusts, and providing recommendation in the administration of non-profits and charities.

For companies, organizations and groups we provide estate planning seminars and for family businesses we offer business succession planning. Group discounts to employees or members of the same institution or corporation are available.

### Estate Planning

The preparation of comprehensive strategies so as to reduce taxes and other financial burdens on clients' estates is essential to protect beneficiaries from avoidable expense and frustration. We provide help with planned giving for charitable purposes.

#### o Trusts

To be able to enhance wealth creation and preservation, we advise individuals, institutions, and businesses on administering, distributing and creating trusts. By working with various lawyers in our firm, accountants, and other business advisors to help to structure and implement trusts to help you attain your future and present needs. Trusts are flexible, powerful tools which comprise discretionary family trusts, corporate reorganizations, estate freezes, "joint spousal" and "alter ego" trusts, non-resident trusts, asset-protection, and planning for succession needs and retirement.

#### o Wills Drafting

We can explore all of your choices in detail and carefully determine your requirements, before preparing your will. Our level of care and attention will help to ensure security and certainty for your estate and will help to guarantee that all your requirements are fulfilled.

#### o Estate Planning for Business Owners

For businesses, we offer advice ranging on topics from succession planning, shareholders agreements, corporate reorganizations and estate freezes.

#### o Adult Guardianship - Incapacity Planning

For adult guardianship problems, our personal method is important for dependent adults and their families. The requirements of these clients need a sensitive touch. Our work includes representing clients making applications for adult guardianship, and offering suggestion regarding the responsibilities of guardians and trustees. We assist with the preparation and use of Representation Agreements and health care directives.

### Probate and Administration of Estates

In order to offer for the requirements of the immediate family members, conserve estate assets, and to address all the various aspects of the estate; clients need both sound and timely advice. We approach the role of Executor or Administrator with the commitment demanded of this responsibility.

The proper administration of an estate includes several steps with which we can provide help. We help with locating wills; collecting, safeguarding and locating assets; preparation of papers needed to acquire Court approval of your appointment as Personal Representative; income taxes and various estate liabilities; preparation and passing of the Personal Representative's Accounts; asset distributions, like for example land transfers; and administrating ongoing trusts for children or lifetime beneficiaries.

Trust institutions, individuals and companies require advice in the administration of estates. In order to provide you with service guaranteed to be comprehensive and well-coordinated, we work alongside other professionals responsible for trusts, banking, insurance, investments and accounting.

### Estate Litigation

We deal with challenges like estate litigation arising from contested wills, the Wills Variation Act, constructive trust claims and trust variations. Our Estate Litigators represent clients in every level of court, and in alternative dispute resolutions such as mediations.

#### o Contested Wills and Trusts

Our skilled litigators act in disputes arising from undue influence, incapacity, improper will execution and poor drafting.

#### o Wills Variation

For those claims which are initiated by disappointed spouses or children, our litigators prepared to represent the claimants, beneficiaries, and estates in wills variation claims.

#### o Constructive Trust Claims

Our teams of lawyers can prosecute and defend in estate litigation matters such as unjust enrichment claims and constructive trust.

#### o Trustee Disputes

In cases of dispute arising from the administration or investment by trustees, the passing of trustee accounts and trustee compensation, we represent pension managers, disappointed beneficiaries and trustees.

#### Mediation

We resolve disputes connected to incapacity, elderly care, estate or estate planning, by offering legal counsel at mediations, and in some cases might act as a mediator, either by the parties directly or by counsel to the parties, before or after litigation is commenced.