



## Whitney Wakeling

### Partner

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Whitney's practice focuses on corporate commercial and securities law.

Whitney has extensive experience advising clients in the investment management industry, including investment fund managers, dealers and investment advisers, with respect to legal issues regarding the development, distribution and ongoing administration of different investment products, including exchange-traded funds, mutual funds and pooled funds. She also advises clients on a wide range of commercial law matters, including mergers and acquisitions, commercial contracts and corporate governance matters.

## Experience

- U.S.-based tech company: Advising a leading U.S.-based technology company in its acquisition of a Canadian quantum computing business.
- Fidelity Investments Canada ULC: Advising Fidelity in relation to the launch of bitcoin funds in Canada
- Canadian Hedge Fund Manager: Advising a hedge fund manager in relation to its merger with a Toronto-based alternative investment fund manager.
- Canadian Investment Fund Manager: Advising an investment fund manager in relation to the sale of its retail investment fund and portfolio management business.
- Restaurant and Hospitality Group: Advising a prominent Canadian restaurant and hospitality group on various acquisitions, divestitures and strategic partnerships.
- U.S. Private Equity Firm: Acting as Canadian counsel to a U.S. private equity firm in connection with the \$2.3 billion acquisition of a global supplier of rigid packaging products and services.

- U.S. Private Equity Firm: Acting as Canadian counsel to a U.S. private equity firm in connection with the \$2.4 billion acquisition of a North American manufacturer of rigid metal and plastic containers used to package industrial, bulk food and retail goods.
- Various Canadian- and U.S.-based Investment Fund Managers: Advising numerous Canadian and U.S.-based investment fund managers in the launch and ongoing administration of their exchange-traded fund platforms, including exchange-traded funds structured as alternative mutual funds.
- Various Canadian- and U.S.-based Investment Fund Managers: Advising numerous Canadian and U.S.-based investment fund managers in the launch and ongoing administration of retail mutual funds.
- Various Investment Fund Managers: Advising numerous investment fund managers in obtaining exemptive relief from securities law requirements in connection with structuring and administering various exchange-traded fund, mutual fund and pooled fund products.
- U.S.-based Investment Fund Manager: Advising a U.S.-based investment fund manager in the launch of its mutual fund and pooled fund platforms in Canada.
- U.S.-based Investment Dealers and Advisers: Advising U.S.-based investment dealers and advisers in connection with obtaining registration under Canadian securities legislation.
- Canadian Securities Intermediary: Advising a Canadian securities intermediary and its board on a variety of corporate governance and compliance related matters.
- Canadian Bank: Acting as Canadian counsel to a Canadian bank on a global outsourcing transaction in connection with outsourcing functions related to its investment fund products and portfolio management services.
- Canadian Biomedical Company: Advising on sale to portfolio company of a prominent global private equity firm.
- U.S. Ingredients Production Company: Advising U.S.-based ingredients production company on acquisition of a Canadian plant-based protein company.
- U.S. Mining Company: Advising U.S.-based mining company on equity investment in Canadian mining project.

## Insights & Events

- Author, "ESG at BLG: Lessons learned from inside the ESG journey at Canada's law firm", BLG Article, April 2024
- Author, "18-year check up: Continuous disclosure review and guidance for IRCs", BLG Article, April 2024
- Author, "OSC issues new summary report with guidance for investment fund and structured product issuers", BLG Article, November 2023
- Author, "ETFs in the spotlight: The CSA review exchange-traded funds", BLG Article, October 2023
- Author, "Reduced regulatory burden for investment funds and managers - progress for 2022", BLG Article, February 2022
- Author, "Conflicted over how to identify and address conflicts?", BLG Article, March 2021
- Author, "BLG Represents First Bitcoin Market Participant to be Approved by Canadian Securities Administrators", BLG Article, September 2017

## Beyond Our Walls

### Professional Involvement

- Member, Law Society of Alberta

- Member, Law Society of Ontario

## Bar Admission & Education

- Ontario, 2013
- Alberta, 2019
- BA (Hons.), Queen's University, 2009, English Literature, B.A. in Political Studies
- JD, Osgoode Hall Law School, 2012

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