Paul W. Taylor

Partner

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Private Client
Estate & Trust Administration
Private Client Planning
Tax
Tax Disputes & Litigation
United States
United Kingdom and Europe
Financial Services
Indigenous Law

Paul's practice focuses on trust, estate, and incapacity planning and administration, as well as corporate law.

His extensive experience includes:

- planning for individuals with high value and complex assets
- working with clients to provide for beneficiaries with disabilities
- preparing, amending and interpreting trusts for indigenous groups

Paul's corporate law experience includes the implementation of corporate structures as part of tax and other planning.

Paul completed a secondment with a major Canadian financial institution to assist in the interpretation and administration of wills, powers of attorney and trusts.

Experience

- Drafting wills, powers of attorney and trusts, including multiple wills for individuals with owner-managed businesses, wills and trusts with provisions providing for the care of beneficiaries living with disabilities and wills containing testamentary trusts.
- Administering and assisting in the administration of estates and trusts.
- Advising on corporate restructuring for planning purposes.

Insights & Events

- Author, "The OSC wants registered firms' "go bags" packed and ready: how firms can tailor their packing lists and how owners can protect their legacies", BLG Article, September 2024
- Panel Moderator, "Planning for and Managing Incapacity: A Nuts and Bolts Approach," STEP National Conference, Toronto, June 2023.
- Speaker, "The New Trust Reporting Rules," Investment Association of Canada Breakfast, Toronto, April 2023.
- Speaker, "Tax Issues: on Settlement, Treatment of Registered Plan Assets on Death (RESP/RDSP)", LSO Estates and Trusts Summit, Toronto/Online, October 2022.
- Co-Host, STEP National Conference, Online, June 2022.
- Panel Moderator, "Trust and Estate Law Update," STEP National Conference, Online, June, 2022.
- Panel Moderator, "Wealth Planning in the Digital Age", STEP National Conference, Online, June 2021.
- Contributor, "Conflict of Laws in Estate Planning," STEP Canada Branch/Chapter Bundle, March 2021
- Panel Moderator, "Tax Update," STEP Canada Branch/Chapter Bundle, February 2021.
- Panel Moderator, "All in the Family," STEP Canada Branch/Chapter Bundle, January 2021.
- Panel Moderator, "Trust Me for Now But Not Forever: Trust Variation, Amendment, and Potential Tax Consequences", STEP -Speakers Series, Online, October 2020.
- Speaker, "Canada and U.S. Cross Border Planning for Mobile Families," STEP Orange County 9th Annual Institute on Tax, Estate Planning and the World Economy, Newport Beach, February 2020.
- Moderator, "Taxation of Trusts and Estates," STEP Full Day Course, Ottawa, January 2020.
- Private Companies: The Next Generation, BLG Perspective, December 2019
- Speaker, "Voluntary Disclosure in Estate Matters," LSO Six-Minute Estates Lawyer, Toronto, April, 2019
- Panel Moderator, "the Complexities of Domestication: Extra-jurisdictional Recognition and Enforcement of Judgments", STEP National Conference, Toronto, June 2019.
- Speaker, "Incapacity and Other Legal Issues," IAFP 2018 Symposium, Gatineau, September 2018
- Moderator, "Planning and Administering a Discretionary Trust – Absolute Freedom?" STEP National Conference, Toronto, May 2018.
- Speaker, "Cross Border Tax Update," LSO Six-Minute Estates Lawyer, May 2018.
- Speaker, "2018 Federal Budget: What Every STEP Advisor Needs to Know," STEP National Webcast, March 2018.
- Author, "Federal Budget 2018 – A Continued Focus on Fairness and the Middle Class", BLG Article, February 2018
- Speaker, "Jurisdictional Issues in Powers of Attorney," LSUC Estates and Trusts Summit, Toronto, October 2017.
- Speaker, "Wills, Estates & Incapacity," Law Society of Nunavut, September 2017.
- Moderator, "International Planning Issues – Updates from the UK to the Far East", STEP National Conference, Toronto, June 2017.

- Speaker, "Border Walls and a Hard Brexit: The Current State of Cross-Border Planning," LSUC Six-Minute Estates Lawyer, Toronto, May 2017.

Beyond our Walls

Professional Involvement

- Member, Law Society of Ontario, Law Society of Nunavut, Canadian Bar Association and County of Carleton Law Association
- Society of Trust and Estate Practitioners (STEP) Worldwide: Recipient of STEP Worldwide Founders Award; International Client Global SIG Steering Committee member
- STEP Canada: Board Member; Chair of STEP National Conference; member of Programming Committee and STEP Inside Editorial Board; former member of Membership Committee, Student Committee, and Human Resources Committee;
- STEP Ottawa: Former Chair and Board Member

Community Involvement

- Former Board President, Ottawa Salus
- Former board member, Bruce House
- Former board member, Ryan's Well Foundation
- Former board member, Fund for a New Generation
- Guardian, Youth Parliament of Manitoba Inc.

Awards & Recognitions

- Recognized in the 2025 edition (and since 2024) of *The Canadian Legal Lexpert Directory* (Estate & Personal Tax Planning)

Bar Admission & Education

- Ontario, 2008
- Nunavut, 2017

- LLB, University of Manitoba, 2007
- Faculty of Arts, University of Manitoba

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