Shaun M. Doody

Partner

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Shaun is a Partner in Fogler Rubinoff's Tax and Wills and Estates departments. He joined the firm in 2013 after previously working at a large boutique Canadian tax firm. His practice centres on corporate and personal taxation and estate planning for owner/managers, entrepreneurs, trusts, and high-net-worth individuals.

Shaun has taken the Canadian Institute of Chartered Accountants In-Depth Tax Course as well as the CICA In-Depth HST/GST Course. He is a regular contributor to the Fogler, Rubinoff LLP tax newsletter "Dollars and Sense", is a co-author of *The Death of a Taxpayer*, and produces an annual webcast for CCH Canadian Limited dealing with estate planning and taxation on death.

Shaun has experience in a number of tax and estates-related areas, including:

- Estate freezes
- Voluntary disclosures
- Owner/manager tax and succession planning including corporate reorganizations
- Will planning and drafting
- Settling trusts, including family, alter ego, joint partner, and others
- Implementing "butterfly" reorganizations (including both 55(3)(a) and (b) reorganizations)

PRACTICE AREAS

Business Succession Planning

Corporate Reorganizations and Transactions

Tax

Wills and Estates

Recent Insights

TAX

Working From Home in the Time of COVID-19

Education & Memberships

EDUCATION

Canadian Institute of Chartered Accountants
CICA In-Depth HST/GST Course, 2016

Canadian Institute of Chartered Accountants
CICA In-Depth Tax Course Parts I and II, 2011

Admitted to Ontario Bar, 2008

University of Toronto Law School, Juris Doctor, 2007

University of Amsterdam Law School, Exchange Program on EU and International Law, 2006

Queens University, Bachelor of Science (Honours)
Combined Specialization in Computing and Information Science and Biology, 2000

MEMBERSHIPS

Law Society of Ontario

Canadian Tax Foundation

Ontario Bar Association

Canadian Bar Association

Society of Trust and Estate Practitioners (STEP Canada)

Article, COVID-19 Resource

TAX

Federal Government Announces Support Plan for Canadian Households and Business

Article, COVID-19 Resource

TAX

Major Proposed Changes to the Taxation of Private Corporations and to Severely Limit Income Splitting

Article

Professional Designations

Trust and Estate Practitioner (TEP)

Speaking Engagements & Publications

The Effect of Embedded Capital Gains on Fair-Market Value
Author, Tax Litigation
18:2 Tax Litigation 1094-1100

Antle: Deceit and Sham
Author, Canadian Tax Highlights
19:3 Canadian Tax Highlights 5-6

Statutory Developments and Jurisprudence Elements of Canadian Tax
Co-Author with Paul J. Gibney, Publication: The Euromoney Corporate Tax Handbook, 6th ed
Euromoney Institutional Investor PLC, 2011

A New Direction for the Surrogatum Principle
Author, Taxation Law
19:3 Taxation Law (Ontario Bar Association)

When Is Income Unearned?
Author, Canadian Tax Highlights
17:11 Canadian Tax Highlights 9-10