Michael Rosen

Partner

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Michael practices in all areas of estates, trusts, incapacity and not-for-profit law.

His expertise includes the planning and drafting of wills, trusts and powers of attorney, the administration of estates and trusts and business succession planning. He also advises clients in both contentious and non-contentious estate litigation matters, including mental capacity matters, guardianship application, passing of fiduciary accounts and disputed wills.

Michael also works in the not-for-profit and charities area, advising charities, not-for-profit organizations, and donors regarding the establishment, governance and regulation of charities and not-for-profit organizations.

Michael's experience includes:

- Planning and implementing effective estate plans for individuals and business owners
- Acting for individuals and families to implement practical and solution-oriented estate plans, including drafting wills, powers of attorney and trusts for business owners, and parents and guardians of persons with disabilities
- Advising regarding cross-border and international estate and trust matters
- Assisting clients with planning for incapable family members
- Advising financial institution regarding complex estate, trust and incapacity issues and best practises
- Working with not-for-profits and charities
- Advising individuals and non-profit organizations on charitable giving and related issues
- Advising executors and estate trustees on how to efficiently manage the estate administration process from beginning to end

Michael is a designated Trust and Estate Practitioner (TEP) from the Society of Estate and Trust Practitioners, and is a member of the Estate Planning Council of Toronto. He is also a member of the Trusts and Estates Law, Charity and Not-for-Profit Law, and Elder Law sections of the Ontario Bar Association.

Michael previously held positions as an estates and trusts lawyer at a national law firm, in the estate and trust group of a major financial institution, and as a lawyer at a Toronto estate and trust litigation firm.

Education & Memberships

EDUCATION

Called to the Ontario Bar, 2015

University of Western Ontario, J.D., 2014

York University, BA (Hons.) Psychology, 2011 (summa cum laude)

MEMBERSHIPS

STEP Canada

Estate Planning Council of Toronto

Ontario Bar Association

Awards & Recognition

The Best Lawyers ™ in Canada
Trusts and Estates

PRACTICE AREAS

Wills and Estates

Estate Litigation

Tax

INDUSTRY GROUPS

Not-for-Profits and Charities

Recent Insights

WILLS AND ESTATES

Alter Ego and Joint Partner Trusts

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