



# **British Columbia Lawyer and Trust Company List**

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LEGAL PROFESSIONALS WITH KNOWLEDGE OF DISABILITY LAW  
Updated September 2024

## **Important Information - Please Read:**

This list is provided for informational purposes only and does not constitute Plan Institute's recommendation or endorsement regarding any person or entity on the list. Lawyers and trust companies on this list have varying degrees of experience regarding how disability may impact setting up your will and managing your trust. Some are more experienced than others and you should always ask them about their experience with disability and otherwise make sure you are satisfied with their credentials and experience before engaging them (as you would do with any other professional advisor). Plan Institute's policy is that we do not and will not endorse any company. You should discuss any fees, disbursements, or taxes that you will be charged with the professional you choose. We have some sample questions at the bottom of this document.

Please note that many of the legal professionals and companies on this list provide services virtually to people anywhere in British Columbia through phone, email, and video call.

If you are having difficulty reaching the specific lawyer or legal professional on the list, it may be more effective to contact the general phone number and email address, as well as marking your query as "URGENT" for a faster response.

This list is also not exhaustive of all legal professionals experienced in disability rights and legislation. You can use Access Pro Bono's free Lawyer Referral Service if you want help looking into professionals that are not on this list. This Lawyer Referral Service helps British Columbians find a suitable legal professional to resolve their legal problem. Any BC resident can call them at 604-687-3221 to meet with a lawyer or a lower-cost articling clinician. For more information, please visit:

<https://www.accessprobono.ca/our-programs/lawyer-referral-service>

If you have any feedback regarding this list, please [click here](#).

# Lawyers

## **Ability Tax and Trust Advisors**

450 Southwest Marine Drive, 18th Floor  
Vancouver, BC V5X 0C3  
1-877-690-0330  
[info@abilitytax.ca](mailto:info@abilitytax.ca)  
[www.abilitytax.ca](http://www.abilitytax.ca)

## **Albert & Co. Law**

Emily Anderson  
206-2636 Montrose Ave  
Abbotsford, BC, V2S 3T6  
604-200-9234  
[emily.anderson@albertlawco.com](mailto:emily.anderson@albertlawco.com)  
[www.albertlawco.com](http://www.albertlawco.com)

## **Alexander Holburn Beaudin + Lang LLP**

Mary B. Hamilton  
Vancouver Office  
2700-700 West Georgia Street  
Vancouver, BC, V7Y 1B8  
604-484-1754  
Toll-Free: 877-688-1351  
[mhamilton@ahbl.ca](mailto:mhamilton@ahbl.ca)  
[www.ahbl.ca](http://www.ahbl.ca)

Kelowna Office  
1100-1631 Dickson Avenue  
Kelowna, BC, V1Y 0B5  
604-484-1700  
Toll-Free: 877-688-1351

**BKS Law**

Brooke Fernandes  
309-1688 152nd Street  
Surrey, BC V4A 4N2  
604-542-5344  
[bfernandes@bkslaw.com](mailto:bfernandes@bkslaw.com)  
[www.bkslaw.com](http://www.bkslaw.com)

**CR Lawyers LLP**

Stewart Carstairs  
250-287-8355  
[carstairs@crlawyers.ca](mailto:carstairs@crlawyers.ca)  
[www.crlawyers.ca](http://www.crlawyers.ca)

Courtenay Office  
350 17th Street  
Courtenay, BC, V9N 1Y4  
250-871-4001  
[info@crlawyers.ca](mailto:info@crlawyers.ca)

Comox Office  
1779 Comox Avenue  
Comox, BC, V9M 3L9  
250-339-7977  
[info@crlawyers.ca](mailto:info@crlawyers.ca)

Campbell River Office  
906 Island Highway  
Campbell River, BC, V9W 2C3  
250-287-8355  
[info@crlawyers.ca](mailto:info@crlawyers.ca)

Ucluelet Office  
1566 Peninsula Road  
Ucluelet, BC, V0R 3A0  
1-866-577-8114  
[ucluelet@crlawyers.ca](mailto:ucluelet@crlawyers.ca)

**DLA Piper (Canada)**

Sadie Wetzel

2700-1133 Melville Street

Vancouver, BC, V6E 4E5

604-643-6499

[sadie.wetzel@dlapiper.com](mailto:sadie.wetzel@dlapiper.com)

[www.dlapiper.com/en-ca/people/w/wetzel-sadie](http://www.dlapiper.com/en-ca/people/w/wetzel-sadie)

**Entrust Law Corporation**

Kristen Okimaw

473 West Avenue

Kelowna, BC, V1Y 1V9

250-448-8558 extension 201

[kokimaw@entrustlaw.ca](mailto:kokimaw@entrustlaw.ca)

[www.entrustlaw.ca](http://www.entrustlaw.ca)

**Geoffrey W. White Law Corporation**

434 Glenwood Avenue

Kelowna, BC V1Y 5M1

250-712-2205

[firm@bcestatelaw.com](mailto:firm@bcestatelaw.com)

[www.bcestatelaw.com](http://www.bcestatelaw.com)

**Heritage Law**

Nicole Garton

220-545 Clyde Avenue

West Vancouver, BC V7T 1C5

778-786-0615 extension 111

[nicole@bcheritagelaw.com](mailto:nicole@bcheritagelaw.com)

[www.bcheritagelaw.com](http://www.bcheritagelaw.com)

**Horne Coupar LLP**

Main Office

612 View Street, 3rd Floor

Victoria, BC, V8W 1J5

250-388-6631

Toll-Free: 1-866-467-2490

[www.hornecoupar.com](http://www.hornecoupar.com)

Oak Bay Office

202-2187 Oak Bay Avenue

Victoria, BC, V8R 1G1

**JA Reimer Law Group**

Colleen Margaret Kovacs

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250-727-9938

[colleen@reimerlawgroup.ca](mailto:colleen@reimerlawgroup.ca)

[www.reimerlawgroup.ca](http://www.reimerlawgroup.ca)

**Lakes, Whyte LLP**

A. John Lakes

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North Vancouver, BC, V7M 2H8

604-984-3646

[johnlakes@lakeswhyte.com](mailto:johnlakes@lakeswhyte.com)

[info@lakeswhyte.com](mailto:info@lakeswhyte.com)

[www.lakeswhyte.com](http://www.lakeswhyte.com)

**Legacy Tax + Trust Lawyers**

Genevieve Taylor

1300-777 Dunsmuir Street

Vancouver, BC V7Y 1K2

604-631-1254

[gtaylor@legacylawyers.com](mailto:gtaylor@legacylawyers.com)

[www.legacylawyers.com](http://www.legacylawyers.com)

**McLellan Herbert, Barristers & Solicitors**

Hugh McLellan  
310-800 West Pender Street  
Vancouver, BC, V6C 2V6  
604-901-5186  
Toll-Free: 800-449-4858  
[www.mclellanherbert.com/lawyers/hugh-s-mclellan](http://www.mclellanherbert.com/lawyers/hugh-s-mclellan)

**Pushor Mitchell**

Theresa Arsenault  
301-1665 Ellis Street  
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Toll-Free: 1-800-558-1155  
[arsenault@pushormitchell.com](mailto:arsenault@pushormitchell.com)  
[www.pushormitchell.com](http://www.pushormitchell.com)

**Richards Buell Sutton**

Tim H.R. Brown  
Vancouver Office  
700-401 West Georgia Street  
Vancouver, BC, V6B 5A1  
604-661-9225  
[tbrown@rbs.ca](mailto:tbrown@rbs.ca)  
[www.rbs.ca/members/brown](http://www.rbs.ca/members/brown)

Surrey Office  
310-15117 101 Avenue  
Surrey, BC, V3R 8P7  
604-582-7743

**Tim Louis & Company**

R. Tim Louis  
2526 West 5th Avenue  
Vancouver, BC, V6K 1T1  
604-732-7678  
[timlouis@timlouislaw.com](mailto:timlouis@timlouislaw.com)  
[www.timlouislaw.com](http://www.timlouislaw.com)

# Trust Companies

## **Coast Mental Health Trust Program**

*Please note that as of September 18th, 2024, Coast Mental Health is not accepting new clients. We will update this information once we receive confirmation of any changes. Feel free to contact Coast Mental Health directly for further assistance.*

293 East 11th Avenue  
Vancouver, BC V5T 2C4  
604-872-3502  
Toll-Free: 1-877-602-6278  
Email contact form:

[www.coastmentalhealth.com/contact](http://www.coastmentalhealth.com/contact)

[www.coastmentalhealth.com/what-we-do/pillar-services](http://www.coastmentalhealth.com/what-we-do/pillar-services)

*Coast is authorized under the provincial regulation to administer trust funds of up to \$500,000 within British Columbia.*

## **Concentra Trust (Equitable Bank)**

Alex Northey, Senior Estates and Trusts Advisor  
236-668-1203

[alex.northey@eqbank.ca](mailto:alex.northey@eqbank.ca)

[www.concentra.ca](http://www.concentra.ca)

[www.eqbank.ca](http://www.eqbank.ca)

*Concentra Trust typically only provides support for larger estates. Please reach out to them directly to confirm availability and associated costs.*

## **CV Trust**

1060-1188 West Georgia Street  
Vancouver, BC, V6E 4A2  
604-674-7801

[info@cvtrustco.com](mailto:info@cvtrustco.com)

[www.cvtrustco.com](http://www.cvtrustco.com)



**Heritage Trust**

West Vancouver Office

Greg Brennand, Vice President and Senior Trust Officer

West Vancouver Office

220-545 Clyde Avenue

West Vancouver, BC, V7T 1C5

778-742-5005 extension 210

[greg@heritagetrustcompany.ca](mailto:greg@heritagetrustcompany.ca)

[www.heritagetrustcompany.ca](http://www.heritagetrustcompany.ca)

Langley Office

400-8621 201 Street

Langley, BC, V2Y 0G9

*Heritage Trust typically only provides support for medium-large estates. Please reach out to them directly to confirm availability and associated costs.*

**Solus Trust Company**

2100-925 West Georgia Street

Vancouver, BC, V6C 3L2

1-866-764-1343

[info@solustrust.ca](mailto:info@solustrust.ca)

[www.solustrust.ca](http://www.solustrust.ca)

*Solus Trust Company typically only provides support for larger estates. Please reach out to them directly to confirm availability and associated costs.*

**Scotiastrust**

Multiple locations across BC

Please reach out through their contact form

<https://www.scotiawealthmanagement.com/ca/en/connect-with-us.html>

<https://www.scotiawealthmanagement.com/ca/en/services/scotiastrust.html>

**Truvera Trust Corporation**

901-700 West Pender Street

Vancouver, BC, V6C 1G8

778-379-3933

[info@truvera.ca](mailto:info@truvera.ca)

[www.truvera.ca](http://www.truvera.ca)

Kelowna Office

1100-1631 Dickson Avenue

Kelowna, BC, V1Y 0B5

250-860-4626

**Westcoast Wills and Estates**

604-230-1068

[info@westcoastwills.com](mailto:info@westcoastwills.com)

[www.westcoastwills.com](http://www.westcoastwills.com)

*Their estate planning lawyers speak English, Cantonese, and Vietnamese.*

Head Office (by appointment only)

308-1200 Lonsdale Avenue

North Vancouver, BC, V7M 3H6

Vancouver Office (by appointment only)

600-1285 West Broadway

Vancouver, BC, V6H 3X8

Burnaby Office (by appointment only)

501-3292 Production Way

Burnaby, BC, V5A 4R4

Squamish Office (by appointment only)

212-39012 Discovery Way

Squamish, BC V8B 0E5

# Tips to help you get to know the knowledge of your potential lawyer

When choosing a lawyer, it is crucial to find someone who understands disability issues as they relate to your estate planning needs. Keep in mind that not all lawyers understand wills and trusts, and not all wills and trust lawyers will understand disability issues. Feel free to use the list below to help you determine if a lawyer is the right one for your needs.

Find out how much of their practice is devoted to estate planning. Many different law firms specialize in different areas of law. It is important to find a lawyer who has a wealth of knowledge regarding estate planning.

Ask the lawyer you are meeting with what percentage of their practice involves planning for people with disabilities and their families. This will give you an idea if they have some knowledge on the topic or they will have to spend time doing research.

Find out how many disabilities trusts they have done in the past year, five years, or ten years.

Ask them what some important key issues and considerations are that may arise while planning for a person with a disability; this will help illuminate their experience.

Ask them about specific laws that are in place when it comes to disability estate planning:

- Does the lawyer charge hourly or is the service flat rate based?
- Has the lawyer ever had a trust rejected by the Ministry, and if so, why?
- Are they familiar with the duties of trustees and how to determine which trustee is best for a family?
- Are they familiar with the asset/income exemptions permitted within British Columbia's provincial disability benefits program?
- Can the lawyer assist with recommendations and the facilitation of discussions with prospective trustees knowledgeable in the area of disability trusts?
- Are they able to explain the difference between a discretionary and non-discretionary trust?
- Can they articulate the relevance of the terms "ultimate beneficiary" and/or "the even-handed principal" with respect to disability trust development?

*Not professional advice; disclaimers: This document and its contents are for informational purposes only and are not legal, tax, investment, financial, medical or other professional advice, and should not be construed as a recommendation for any particular course of action. Plan Institute is providing the information "as is" and is not responsible or liable for any inaccuracies, errors, or omissions in the information, or for the information being incomplete or out of date. You use the information and make decisions and take actions in reliance on the information solely at your own risk, and Plan Institute will not be liable for your use or reliance on any information it provides. You should consult with qualified professional advisors before making any legal, financial, medical or health care decisions.*