



## Lucinda (Lucy) E. Main

Lucy – a partner in the firm’s Wills, Trusts and Estates group – realized early on in her career that she had a particular interest in the legal and taxation issues surrounding estate and trust planning and administration. Her accomplishments in, and contributions to, these areas of law were recognized in 2016 when she was awarded the Hoffstein Book Prize by the Ontario Bar Association (OBA). She has been recognized by The Canadian Legal Lexpert Directory as a leading practitioner in Estates & Personal Tax Planning (in 2019 repeatedly recommended and in 2020 consistently recommended) and in the 2020 and 2021 editions of Best Lawyers in Canada for Trusts and Estates.

Day to day, Lucy advises Canadian and international clients on a wide range of estate, trust and tax matters, including:

### Contact

416.306.1802

[lmain@beardwinter.com](mailto:lmain@beardwinter.com)

### Call to Bar

2008

### Education

LL.B., 2007

Queen’s University

B.A. (Hons.), 2004

University of Western Ontario

### Practice Areas

- ▶ Estate and Trust Planning
- ▶ Estate and Trust Administration
- ▶ Powers of Attorney

### Associations

- ▶ Canadian Bar Association
- ▶ Canadian Tax Foundation
- ▶ International Association of Young Lawyers (AIJA)
- ▶ Ontario Bar Association
- ▶ Society of Trust and Estate Practitioners (STEP)

- drafting estate planning documents, including Wills, Continuing Powers of Attorney for Property and Powers of Attorney for Personal Care;
- working with family businesses and closely-held private companies with regard to their tax and business succession planning;
- establishing private charitable foundations for individuals and families;
- advising clients on methods in which to minimize income tax and estate administration tax (i.e. probate fees) payable on death;
- counselling beneficiaries of estates, executors of estates, trustees of trusts and attorneys for property and personal care;
- helping with the administration of an estate (i.e. the probate process);
- advising on the Canadian taxation of various domestic and international trust structures and succession plans;
- assisting in the setting up and maintenance of domestic and international trusts; and
- providing support to litigators in contentious estate and trust matters (e.g. Will challenges, passing of accounts, testamentary capacity disputes, guardianship, dependant’s relief claims, etc.).

Lucy works closely with other members of the firm’s Wills, Trusts and



## Lucinda (Lucy) E. Main (Continued)

Estates group in an effort to provide timely and cost-effective advice and work product for her clients.

Since her call to the bar in 2008, Lucy has persistently pursued ways in which to build her skill set and knowledge to better serve her clients. To this end, in 2013 she completed the requirements necessary to earn the Trust and Estate Practitioner (TEP) designation from the international Society of Trust and Estate Practitioners (STEP) and spent a couple of years working as an associate lawyer in the Wealth Management and Tax groups of a national law firm.

In addition to her client work, Lucy very much enjoys actively participating in associations with an emphasis on trust, estate and tax legal matters: she was an executive committee member of the OBA's Taxation Law Section (2009-2014); a committee member of its Trusts and Estates Law Section (2009-2011); an executive committee member of its Trusts and Estates Law Section (2011-2016); a member of the steering committee of the Toronto chapter of the Canadian Tax Foundation's (CTF) Young Practitioners Group (2011-2013); an organizing committee member of the CTF's annual Ontario Conference, The Definitive Tax-Planning Conference for Advisors to Owner-Managed Businesses (2013, 2014 and 2015 conferences); a member of the Toronto Public Library's Law at the Library committee (2015); and an organizing committee member of the invitation-only Senior Estates & Trusts Practitioners' Forum – November Edition (2016 and 2017 conferences). Lucy co-founded the Toronto Junior Trusts and Estates Practitioners' Group (JTEPG) which has grown to approximately 100 young trust and estate planners and litigators in Toronto who meet monthly to discuss current trust and estate matters and is now run and maintained independently of her. For several years Lucy has been engaged in the work of the International Association of Young Lawyers (AIJA) and was its Canadian representative between 2013 and 2016 and took on the role again between 2018 and 2020.



## Lucinda (Lucy) E. Main (Continued)

In addition to her committee work, Lucy frequently writes and co-authors articles for various publications (both domestic and international) including *Trusts and Trustees*, *Journal of International Tax*, *Trust and Corporate Planning* and *Canadian Tax Focus*. She has co-authored chapters including the following: *Family Offices: The Society of Trusts and Estates Practitioners Handbook for Advisors (STEP and Global Business)*, *International Trust Laws (Jordan Publishing)* and *A Guide to International Estate Planning: Drafting, Compliance, and Administration Strategies (American Bar Association)*. In 2019 she joined the editorial board of Thomson Reuters' *Taxes & Wealth Management* quarterly publication and the STEP Toronto branch newsletter committee.

Lucy regularly presents at legal conferences including for AIJA, Law Society of Ontario (formerly known as the Law Society of Upper Canada), OBA, STEP, CTF and American Law Institute/American Bar Association. She is frequently invited to present at gatherings of non-lawyers including giving talks to financial advisors and their clients and at various Toronto Public Library branches.

Lucy enjoys mentoring young lawyers as she has herself been fortunate enough to be mentored by some excellent lawyers. To this end, she has taken part in mentoring events hosted by the OBA and Young Women in Law. She also speaks at several Law Society and OBA conferences, among others, whose target audiences are young lawyers and in 2018 and 2019 she was a faculty member of the Osgoode Intensive Program in Wills and Estates teaching the Estate Planning and Administration courses.

Lucy is also an active member of her law firm. In the past she has been a member of its articling committee which is tasked with recruiting students to the firm and founded a women's group in an effort to help support the female lawyers at the firm.