

Andrew Coates

Partner

He/Him



CALLED TO THE BAR OF ONTARIO,
2020

EDUCATION

- J.D., Osgoode Hall Law School, 2019
- B.A. (Honours), York University, 2010

PRACTICE AREAS

- Wills & Estates
- Tax

Andrew assists individuals, families, and family offices with their private wealth legal needs, focussing on estate & trust planning and administration.

Drawing on the firm's full-service capabilities in addition to his expertise as a designated Trust and Estate Practitioner (TEP), Andrew designs holistic estate plans integrating traditional wills and powers of attorney with private company structures, trusts, tax planning, charitable giving strategies, real estate holdings, family law concerns, beneficiaries with disabilities, and the complexities of foreign assets and non-resident parties.

Andrew also advises executors, trustees, and beneficiaries through various estate & trust administration processes. This includes probate applications, post-mortem tax planning, accountings, 21-year rule trust planning, and managing tensions between trustees and beneficiaries. In addition, Andrew is experienced in matters involving attorneys for property and personal care, non-contentious guardianship applications, and not-for-profit corporation formation, governance, and charitable registration.

Andrew returns to Blaney McMurtry after practicing in the private client group of an international law firm and, most recently, as a member of the family office services team in the wealth

management division of Canada's largest bank. This varied experience has taught Andrew that the foundation of private client work is establishing a genuine rapport with clients to earn trust and build long-term relationships. He does this by taking the time to understand each client's unique situation and goals in order to recommend solutions that preserve both wealth and family relationships from one generation to the next.

MEMBERSHIPS

- Society of Trust and Estate Practitioners (STEP)
- Law Society of Ontario
- Ontario Bar Association

COMMUNITY SERVICE

- Volunteer, Pro Bono Ontario Free Legal Advice Hotline
- Board member, Leaside Day Care Centre