



Kimberly A. Whaley, CS, TEP, LLM

LITIGATION PRACTICE

Kimberly A. Whaley is the founder and principal of the Toronto Boutique Trusts & Estates Litigation Firm, Whaley Estate Litigation Partners (WEL PARTNERS), having started her own law practice in 2005. Kimberly is also a Solicitor of the Supreme Court of England and Wales. Her practice is restricted to the resolution of estate and related disputes throughout Ontario including:

- Will, Estate & Trust Disputes
- Advising Fiduciaries
- Dependant's Support Claims
- Passing of Estate, Trustee, Attorney, Guardian & Fiduciary Accounts
- Capacity Proceedings
- Guardianships
- Power of Attorney Disputes
- Consent & Capacity Board Proceedings
- End-of-Life, Treatment Decisions & Medical Assistance in Dying
- Elder Law/Elder Financial Abuse
- Solicitor's Negligence
- Representation of Persons Under Disability
- Probate Applications
- Opinions
- Appeals
- Agency Services
- Approval Motions Under Rule 7

WEL MEDIATION

Kimberly is a qualified Mediator, mediating estate and trust related disputes within her practice areas.

RECOGNITIONS

- Designated as a Certified Specialist in Estates and Trusts Law by the Law Society of Upper Canada, 2006
- Distinguished Fellow of the Canadian Centre for Elder Law (CCEL), 2012
- Designated as a TEP, Society of Trusts and Estates (STEP) Worldwide, 2002
- Global Law Experts, (GLE) Trust & Estate Law Firm of the Year in Canada, 2016
- Corporate International Magazine Global Awards, Estate Litigation Lawyer of the Year in Canada, 2018
- Named in National Law Journal's List of Divorce, Trusts and Estates Trailblazers, May 2017
- Ranked annually by Canadian Lawyer since 2014 as one of the Top 5 Trusts and

Estates Boutique Firms in Canada

- Peer selected annually since 2008 for inclusion in *The Best Lawyers™ in Canada* for work in Trusts & Estates
- Peer chosen by Lawday Leading Lawyers as one of the top 60 leading lawyers in Canada in Estates and Trusts
- Martindale-Hubbell – BV Distinguished Rating in both Legal Ability and Ethical Standards
- Lexpert ranked in the Canadian Lexpert Legal Directory, an acknowledgement of excellence by peers and colleagues
- Ranked in Chambers and Partners Canada as a leading lawyer, member of a select group at the very top of the profession in the area of Private Client Disputes, Contentious Trusts, and High Net Worth clients

AWARDS

- Awarded the OBA-Hoffstein Book Prize in 2009, recognizing contributions and achievements by Members of the OBA in Wills, Trusts, Estates, Writing and Teaching
- Inducted Fellow, Canadian Center for Elder Law (CCEL)
- Special Lecture Award Recipient, Queens University Law School

PROFESSIONAL ASSOCIATIONS AND MEMBERSHIPS

Current

- CBA Elder Law Executive, Section Chair, 2017
- OBA Elder Law Executive, Section Vice-Chair, 2017
- Civilian Co-Chair, Toronto Police Service Seniors Community Consultative Committee (TPS SCCC), Abuse of Older and Vulnerable Persons
- Past-Chair of the OBA Trusts & Estates Executive
- Past Member of the CLE Main Committee Executive
- Past Member of the OBA Awards Committee
- Past-Chair Toronto Branch of The Society of Trust and Estate Practitioners (STEP), Toronto, and Past Director of STEP CANADA, and was an Executive Member for 8 years on several sub-committees including Program Officer
- Full Member of STEP Worldwide as a Trust and Estate Practitioner
- Continuing Member of the STEP Canada National Conference Planning Committee
- Past Member of the Ontario Bar Association's JUST Editorial Board

- Honorary Member of The Professional Advisory Group of the BAYCREST Foundation
- Estate Planning Council of Toronto, Member
- Estate List Users Committee of the Ontario Superior Court of Justice at Toronto since its inception in 2003

TEACHING

- Appellate Advocacy, Queen's University, Adjunct Professor, receiving the Queen's University Special Lecturer Award
- University of Toronto Law School, Estates Course, Adjunct Professor
- Instructor, Osgoode Bar Admission Course, Trust & Estates
- Regularly presents at Continuing Legal Education programs for lawyers, in-house financial institutions, Institute of law Clerks of Ontario (ILCO), hospitals, accountants, financial advisors and other community organizations and foundations, universities, colleges, Ontario and Toronto Police, community centers and libraries
- Maintains a teaching affiliation with the University of Toronto as a guest lecturer in a Sociology and Gerontology course on Law and Aging and on Financial Abuse of the Elderly

PUBLICATIONS

Publications include published books, legal journals and periodicals referenced on full CV and website:

<http://welpartners.com>