Borden Ladner Gervais

PETER J. GLOWACKI

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Family Wealth Counsel
Estates and Trusts
Estates and Trust Litigation
Charities and Not-For-Profits
Team North®
Indigenous Law

Education / Bar Admissions

LLB, Robson Hall — University of Manitoba, 1991

Manitoba, 1992

British Columbia, 2013

Professional Involvement

Member, CBA BC Wills and Trusts Section and Charity and Not-for-Profit Law Section

Member of Society of Trust and Estate Practitioners and member of subcommittee to respond to British Columbia "Land Owner Transparency Act White Paper"

Vice-Chair, Charities and Not-for-Profit Law Section of Canadian Bar Association

Member, Estate Planning Council of Vancouver

Past Executive Member of Wills, Estates and Trusts Section of Canadian Bar Association and its testamentary trusts Finance submission subcommittee

Member, ABA Real Property, Trust and Estate Law Section

Member of Steering Committee for Cambridge Forums: Senior Practitioners Estate Planning & Litigation Forum

EXECUTIVE SUMMARY

Peter Glowacki is Regional Co-Leader (Planning and Administration) of our Vancouver Family Wealth Counsel Group and practises primarily in the areas of wills, trusts and estates law, including more than 25 years of experience in all aspects of trust and estate planning, administration and litigation. This includes the planning, preparation and ongoing advice to settlors, trustees and beneficiaries pertaining to all aspects of the administration of inter-vivos, first nations, off-shore and testamentary trusts.

Peter has a TEP designation from the Society of Trust and Estate Practitioners and has had a lengthy connection with the Canadian Bar Association, including being a member of the Wills, Estates and Trusts Section and being an executive member and Vice-Chair of the National Charity and Not-for-Profit Law Section. Peter has participated in the planning and presentation of numerous educational sessions to professionals, the public and various groups and associations relative to Wills, Trusts and Estates as well as Charity and Not-for-Profit matters.

PUBLICATIONS & PRESENTATIONS

- Presenter, "Avoiding the Pitfalls, Part II: Drafting to Avoid Trust Litigation", Pacific Business & Law Institute's *The Changing Landscape of Trusts: Beyond the Status Quo*, June 6, 2018.
- Presenter, "Avoiding the Pitfalls: Drafting Around the Most Commonly Litigated Areas", Pacific Business & Law Institute's *Estate Planning Done Right Conference*, January 30, 2018.
- Presenter, "Canada - U.S. Estate Planning Update," STEP-Seattle, September 28, 2017
- Presenter, "Will Formalities – Updates in Canada and Abroad," 2017 STEP Canada National Conference, June 12, 2017.
- Presenter, "The Aging Investor: Advising Seniors & Vulnerable Clients on Financial Matters," BLG Client Presentation, May, 2017.
- Presenter, "Planning Amid Pending Tax Reform: Strategies for Domestic and International Clients," STEP San Francisco – March 30, 2017.

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Community Involvement

Member (Vice-Chair), Board of Directors of Canuck Place Children's Hospice and its Executive Committee, as well as Co-chair of its Governance Committee

Past-Reader, BLG Reads to Kids Program

United Way of Vancouver

- Presenter, "The Grey Areas of Incapacity," Estate Litigation Update 2016, Continuing Legal Education Society of British Columbia (CLE BC), October 2016.
- Presenter, "Succession Planning for a Business: Tools and Strategies for Success," 2016 Independent Financial Brokers BC Spring Summit, May, 2016.
- Quoted, "Help prevent family financial feuds with careful estate planning," *The Insurance & Investment Journal,* March 30, 2016.
- Presenter, "Capacity and the Aging Client," 2015 Independent Financial Brokers BC Fall Summit, November 2015.
- Presenter, "Canadian Taxation: An Update of Select Key Issues," STEP-Seattle, November 19, 2015.
- Presenter, "Mental Incapacity in a Commercial Setting", BLG U In-House Counsel Professional Development Series, September 29, 2015.
- Presenter, "Wills, Formalities in Ontario, the Rest of Canada and the Rest of the Common Law World," STEP - Ottawa, May 20, 2015
- Presenter, "Changes to the Administration of Estates, Testamentary Trusts, Disability Trusts, Life Interest Trusts and Charitable Giving on Death – What all Advisors Need to Know!," April, 2015.
- Contributed to "*BC Probate and Estate Administration Practice Manual,"* 2014 through 2018 Updates (CLE BC).
- Contributor, Lexis Practice Advisor Canada: Wills, Trusts & Estates (British Columbia).
- Presenter, "Responsibilities After Obtaining the Grant," Pacific Business & Law Institute's Administration of Probate Conference, January 2015.
- Contributor, *ADR and Trusts: An International Guide to Arbitration and Mediation of Trust Disputes*, Spiramus Press Ltd., 2015.
- Presenter, "Probate – What it is and how to reduce probate fees," 2014 Independent Financial Brokers BC Fall Summit, November 2014.
- Co-Author, "Building Plans," *STEP Journal,* November, 2014.
- Facilitator, "Understanding the BC Society Act," on behalf of Vantage Point for the 2014 Gymnastics BC Business Congress, October, 2014.
- Presenter, "Challenging the Estate Plan: When Good Planning is not Enough," Estate Litigation Update 2014 – Continuing Legal Education Society of British Columbia (CLE BC), October 2014.
- Author, "Real Property Planning," STEP Inside - Newsletter of the Society of Trust and Estate Practitioners (Canada), October 2014.
- Presenter, "Update on the Wills Estates and Succession Act (British Columbia) and other Canadian planning issues" STEP-Seattle, September 25, 2014.
- Presenter, "Real Property Rundown," 2014 STEP Canada National Conference, June 17, 2014.
- Presenter, "An Update on the Family Law Act and Discretionary Trusts," CBA BC Wills and Trusts Sections Professional Development Joint Conference and Retreat, May 2014.
- Presenter, "New Estate Planning Legislation: Changes You and Your Client

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Should Know About," 2014 Independent Financial Brokers BC Spring Summit, April 2014.

- Author, "New Family Law Act has Important Property Ownership Implications for Business Owners," *Business in Vancouver*, February 2014.
- Presenter, "Trusts: The Basics," 2013 Independent Financial Brokers BC Fall Summit , November 2013.
- Presenter, “Trusts: What They Are and Why You Need Them,” Independent Contractors and Businesses Association, December, 2013.
- Presenter, "Navigating CRA’s Guidance: A Review of the Latest Guidance Issued by the CRA Charities Directorate," CBA BC Charity and Not-for-Profit Law Section, October 2013.
- Author, "British Columbia’s New *Family Law Act* and Implications for Discretionary Trusts," BLG’s Wealth Management Bulletin, September 2013.

RANKINGS & RECOGNITIONS

- Selected by peers for inclusion in the 2018 (and since 2014) editions of *The Best Lawyers in Canada®* (Trusts and Estates).
- Martindale-Hubbell® BV® Distinguished™ 4.4 out of 5 Peer Review Rating.

ABOUT BORDEN LADNER GERVAIS LLP

Borden Ladner Gervais LLP (BLG) is a leading, national, full-service Canadian law firm focusing on business law, commercial litigation and arbitration, and intellectual property solutions for our clients. BLG is one of the country’s largest law firms with more than 700 lawyers, intellectual property agents and other professionals in five cities across Canada. We assist clients with their legal needs, from major litigation to financing to trademark and patent registration.

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