



“Gives pragmatic, detailed and results-oriented advice.”

## Jesse Porter

Lawyer

Follow on LinkedIn 

 289.805.4633

 Email

Jesse Porter advises on all matters related to trusts, estate planning, estate administration, business succession, and related tax considerations.

High-net-worth individuals can depend on Jesse to achieve their estate planning goals using succession planning, multiple wills, trusts, and other tools to minimize taxes and provide estate and creditor protection.

He frequently advises parents of children who have disabilities. This includes utilizing the tools necessary to secure protection to ODSP and other government-related benefits. He also advises executors, trustees, attorneys for property and personal care, and beneficiaries of estates and trusts on a wide range of matters.

When acting for estate trustees, including estates that control businesses or business assets, Jesse advises estate trustees on the interpretation of wills, filing for probate, the roles and obligations of estate trustees, distributions to beneficiaries, estate trustee compensation, and passing of accounts. Jesse also assists executors in the efficient management of any business interest.

Furthermore, he prepares powers of attorney for property and personal care, wills, multiple wills, mirror wills, family trusts, insurance trusts, spousal trusts, alter ego trusts, and discretionary trusts.

Jesse gives pragmatic, detailed and results-oriented advice in a calm and friendly manner. His clients trust his professional and competent guidance and frequently recommend him to others seeking estate-related guidance.

## Expertise

- Wills, Estates & Trusts
- Estate Administration

- Executors and Trustees
- Family Business Succession
- Family Trusts
- Guardianship and Capacity Law
- Powers of Attorney
- Trusts
- Trusts for Disabled Beneficiaries
- Wealth Management and Estate Planning
- Wills

## Education

J.D., University of Western Ontario, 2017

B.A. (Hons.), University of Guelph, 2014

**Called to the Ontario Bar, 2018**

## Memberships

- Member, Law Society of Ontario
- Past Board Member, Dalhousie Youth Support Services

## Publications

- Tax-Free First Home Savings Account: Estate Implications And Income Splitting Opportunities December 2023
- Your Estate Planning May Be Creating Unintended Tax Reporting Obligations November 2023
- Prescribed Interest Rate to Climb to 2% in July 2022 May 2022
- What Effect Does a General Revocation Clause in a Will Have On Prior Beneficiary Designations? March 2022
- Pallett Valo Adds New Associate to Wills, Estates and Trusts Group April 2021
- Jesse Porter Joins Pallett Valo's Wills, Estates and Trusts Group April 2021

## Other Publications

- STEP Connection Toronto Branch Newsletter, "In Case You Missed It, October 11, 2023: Probate Planning - Is It Still Worth the Hype?", Summary, Vol. 11, No. 2 - April 2024

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