



“Professional, knowledgeable and approachable with a passion to help people.”

Lisa C. Sticht-Maksymec

Partner

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 Email

Lisa Sticht-Maksymec’s practice encompasses all aspects of estate planning, estate administration, power of attorney/guardianship administration, estate litigation and applications for guardianship for incapable adults.

As a senior member of the Wills and Estates Practice, her approach explores both legal and practical solutions to matters that are inevitably personal, sensitive and emotional.

Estate planning

Lisa provides clients with broad estate planning advice and prepares comprehensive Wills, testamentary trusts of all kinds, *inter vivos* trusts, powers of attorney for property, powers of attorney for personal care, living Wills, Wills Agreements and related documents needed to implement comprehensive estate plans, tailored to each client’s unique needs.

Years of experience with estate administration and estate litigation, enable Lisa to identify practical solutions to clients’ estate planning needs, to advise about the best ways to plan for the efficient administration of their estates, and to avoid costly family disputes at the estate planning stage.

She works with high net-worth individuals, families, spouses in blended families, and successful business owners and entrepreneurs who are looking for efficient ways to transfer their wealth to the next generation. Lisa also works closely with families who have children with disabilities to protect ODSP eligibility.

Estate administration

Executors and trustees seek Lisa’s advice and guidance about their duties and responsibilities in the administration of estates and trusts, from applications for certificate of appointment of estate trustee (with or without a Will), to resolving claims against estates, passing accounts and winding up estates. Her experience extends to administering estates with foreign beneficiaries

and foreign assets.

Furthermore, she advises and guides beneficiaries who want to better understand their rights and interests. She assists executors or attorneys for property in accounting matters and, where necessary, in bringing applications for formally pass accounts before the court. She also regularly advises attorneys and guardians about their duties and responsibilities.

Providing advice both before and after clients are appointed by the court, Lisa assists individuals and trusts companies in becoming guardians for property and for personal care of incapable adults. Likewise, she assists attorneys and guardians to account to the Public Guardian and Trustee and to obtain judicial discharge. Her extensive experience has been recognized by the Ontario Public Guardian and Trustee's Office, as she has been appointed on several matters as section 3 counsel under the *Substitute Decisions Act* to represent persons whose capacity is in issue in legal proceedings.

Estate litigation

Acting for executors, trustees, attorneys for property, attorneys for personal care, guardians and disgruntled beneficiaries, Lisa appears regularly at the Superior Court of Justice on motions and applications and represents clients in mandatory and voluntary mediation.

She represents clients in a variety of estate litigation matters, including contested passings of account, challenges to the validity of Wills, removal of executors or trustees, dependent relief claims, obtaining orders for assistance and directions from the court, proving lost Wills and contested guardianship applications.

Expertise

- Wills, Estates & Trusts
- Elder Law
- 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

Industries

- Healthcare

Education

B.A., University of Waterloo (1995)
LL.B., Queen's University (1998)

Called to the Ontario Bar, 2000

Awards

- Lisa Sticht-Maksymec Recognised as a Leading Author by Lexology – Canada

Memberships

- Member, Law Society of Upper Canada
- Member, Canadian Bar Association
- Member, Ontario Bar Association, Trusts and Estates Law Section
- Member, Peel Law Association
- Member, Estate Planning Council of Mississauga
- Member, Endowment Committee of the Community Foundation of Mississauga
- Member, Grants Committee of the Community Foundation of Mississauga
- Past Board Member, Big Brothers Big Sisters of Peel

Publications

- Pallett Valo Welcomes Six Partners January 2024
- Things You Should Know About Using RDSPs as Part of Your Disabled Child’s or Grandchild’s Financial Future January 2023
- Things You Should Know About Using RDSPs as Part of Your Disabled Child’s or Grandchild’s Financial Future September 2022
- Joint Accounts – What Financial Advisors Should Know November 2020
- Tips for Estate Trustees: Selling Property, Avoiding Probate/EAT & First Dealings June 2020
- Good News: Wills and Powers of Attorney Can Now Be Signed by Counter-Parts Using Audio-Visual Communication Technology April 2020
- Estate Administration During COVID-19 April 2020
- Obtaining Probate During the COVID-19 Crisis April 2020
- Have You Made Your Will Yet? November 2019
- ODSP Asset and Income Exemption Limits January 2019

Other Publications and Presentations

- Lisa Sticht-Maksymec – Pallett Valo Women Leadership Interview
- Regular Guest Speaker, Community Living Mississauga
- Regular Guest Speaker, Brampton Caledon Community Living
- Guest Speaker, University of Toronto Family Care Office
- Participation in the Licensing Process Solicitor Examinations, Law Society of Ontario

“When my father passed away, Lisa helped our family beyond expectation and showed ultimate empathy, which I will never forget. Lisa is professional, knowledgeable and approachable.”

- A client

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