Dwight D. Dee

Associé

Vancouver

BUREAUX

604.643.1239

ddee@millerthomson.com

Secteurs et Expertises

EXPERTISE

Services aux particuliers | Successions et fiducies | Droit des sociétés | Marchés financiers et valeurs mobilières | Organismes de bienfaisance et à but non lucratif

Biographie

ADMISSION AU BARREAU

British Columbia, 2000

FORMATION

- LL.B., University of British Columbia, 1999
- B.A. (history and religious studies, first class), University of British Columbia, 1996

LANGUES

Anglais

Dwight Dee, TEP, has an estates, trusts and business law practice. Dwight's exceptional client service and practical solutions stand out in his work. He provides skillful guidance on estate planning and wealth transfer strategies. He works with clients and their advisors to develop and implement plans to minimize tax liabilities and safeguard family legacies. Dwight's practice also includes regularly advising executors and beneficiaries with estate and trust matters whether contentious or non-contentious. He also has significant experience working with Indigenous communities in drafting and advising on settlement and community trusts.

Dwight's published works and editorial roles in legal publications reflect his experience and commitment to staying at the forefront of legal developments, making him a trusted and reliable legal advisor for a wide range of clients. He is a member of the editorial board of the BC Probate & Estate Administration Practice Manual published by CLEBC and a member of the executive of the Society of Trust and Estate Practitioners – Vancouver Branch.

Dwight is a distinguished leader in his practice area. Beyond his professional accomplishments, he is involved in industry and charitable organizations in executive or board roles.

Engagement

Reconnaissance

- *Best Lawyers in Canada,* Trusts and Estates, 2024 – 2025
- Recipient, Award for Highest Mark in Law of Trusts, Society of Trust and Estate Practitioners (STEP) Canada, 2016
- Appointed to Securities Law Advisory Committee of the BC Securities Commission, 2010
- Graduate, Leadership Vancouver, Vancouver Board of Trade and Volunteer Vancouver, 2003
- Recipient, University of British Columbia Chancellor's Scholarship, 1992 – 1996
- Frequent Speaker and Course Chair for BC Continuing Legal Education

Leadership éclairé

Presentations

- Speaker, "Estate Planning Through the Generations", Miller Thomson Series, November 2022
- Moderator, "More Generosity, More Planning: Update on Charitable Giving", STEP Vancouver, November 2022
- Plenary Speaker, "Recent Developments and Trends in Estate Planning" – Chartered Professional Accountants of BC "Estate Planning Insights Conference", October 2021
- Speaker, "Effective Estate and Tax Planning Strategies: Navigating the New Normal", Miller Thomson Series, July 2020
- Panelist and Speaker, "Ten Ethical Dilemmas", STEP Vancouver, November 2019
- Speaker, "Planning for Indigenous Clients," Estate Planning Council of Victoria, June 2019

- Speaker, “Estate Planning On and Off Reserves,” National Aboriginal Trust Officers Association 6th Annual Trust and Investment Conference, May 2019
- Presenter, “Estate and Succession Planning”, Wolters Kluwer Sale of Business Seminar Series, November 2018
- “Recent Developments in Charities and Not-For-Profit,” Miller Thomson Social Impact seminar, 2018
- Presentations to various financial institutions:
  - “10 Steps to an Effective Estate Plan”
  - “Dealing with Aging Clients”
  - “Registered Accounts and Estate Planning”
  - “Don’t Leave Your Wealth to Lawyers”

- “Securities Fundamentals: Private Placements,” Continuing Legal Education Society of BC course, 2014
- “Exempt Market Securities: An Overview of the Legal Requirements and the Opportunities for Raising Capital and Investing,” Professional Chartered Accountants of BC seminar, 2014
- “Securities Fundamentals: Plans of Arrangement,” Continuing Legal Education Society of BC course, 2013

Publications

- “Passing on the family cottage”, Miller Thomson *Wealth Matter*s newsletter, September 2020
- “*Petrick (Trustee) v Petrick*: Another reminder to be careful with joint tenancies”, Miller Thomson *Wealth Matter*s newsletter, December 2019
- “U.S. Class Action filed for Canadians who receive U.S. retirement benefits”, Miller Thomson *Wealth Matters* newsletter, March 2019
- “BC Government moves ahead with speculation and vacancy tax”, Miller Thomson *Wealth Matters* newsletter, November 2018
- “Home is where the . . . . domicile is?”, Miller Thomson *Wealth Matters* newsletter, September 2018
- “BC Government to introduce speculation tax”, Miller Thomson *Wealth Matters* newsletter, May 2018
- “*Zeligs v. Janes*: Severing joint tenancy”, Miller Thomson *Wealth Matters* newsletter, August 2016

Published Works

- Editorial Board Member, *British Columbia Probate & Estate Administration Practice Manual,* British Columbia Continuing Legal Education.
- “Petrick (Trustee) v. Petrick: Another Reminder to be Careful with Joint Tenancies,” *Taxes and Wealth Management*, March 2020, Issue 13-1
- Co-author, Canada chapter in *Private Client 2020*, International Comparative Legal Guide
- Contributing Author, *British Columbia Probate & Estate Administration Practice Manual, Chapter 10: Transmission and Transfer of Assets in Estate Administration,* British Columbia Continuing Legal Education

Postes d'administrateur

- Board Member, Society of Trust and Estate Practitioners (STEP), Vancouver Branch

Adhésions et affiliations

- Society of Trust and Estate Practitioners (STEP)
- Canadian Bar Association, Wills & Trusts Subsection