Nicole Woodward

Partner

Toronto

OFFICE
416.596.2115

nwoodward@millerthomson.com

Industries & Expertise

INDUSTRIES

Municipal, Planning & Land Development | Transactions & Leasing | Real Estate

EXPERTISE

Transactions & Leasing | Municipal, Planning & Land Development | Charities & Not-For-Profit | Real Estate | Aboriginal Law

Biography

BAR ADMISSION

Ontario, 2007
Alberta, 2005
British Columbia, 2003

EDUCATION

- J.D., University of Saskatchewan, 2002
- B.Sc. (with Distinction), University of Lethbridge, 1999

Nicole Woodward is the National Practice Group Leader of Miller Thomson's Private Client Services Group. Nicole's practice focuses on trusts, estates, succession planning, and taxation in relation to those areas. She guides clients through intricate domestic and cross-border estate matters, aiding in high-net-worth estate planning, trust planning and administration, and will preparation. Nicole works with First Nations to develop trusts to steward funds for the benefit of the First Nation and members, and aid the journey towards self-determination. Each trust developed with input through community engagement, and is customized to the needs of the First Nation. Nicole also has a wealth of experience in strategic planning, governance and policy for First Nations, including developing and implementing strategic plans, business and governance structures, and policies and procedures,

With authoritative publications and engaging presentations, including those on Indigenous trusts and estate planning, Nicole demonstrates a commitment to legal education and advocacy. Her contributions across various legal platforms showcase her experience in estate planning and trusts.

Nicole holds a prestigious TEP designation from the Society of Trust and Estates Practitioners and has held a number of leadership roles in the realm of trusts and estates law. Nicole's accolades in private wealth law and estate planning affirm her as a top legal mind in Canada.

Industry involvement

Recognition

- *The Best Lawyers in Canada* – Trusts and Estates, 2021-2025
- *Chambers High Net Worth Guide*, Private Wealth Law – Canada, 2024
- *The Canadian Legal Lexpert Directory* – Estate & Personal Tax Planning, 2020 – 2024

Thought leadership

Published Works – Books

- Nicole Woodward, ed., *Miller Thomson on Estate Planning, Thomson Reuters*, Looseleaf updated regularly
- Elena Hoffstein and Nicole Woodward, *The Trusts chapter of Halsbury's Laws of Canada*, LexisNexis
- Nicole Woodward and Maddi Thomas, Chapter 23: Wills Under the Indian Act. In *Wills and Estates: Cases, Text and Materials*, Howard S. Black. 4th ed. Edmond Montgomery Publications, 2023
- Advisor to Jean Blacklock and Sarah Kruger, *The 50 Biggest Estate Planning Mistakes . . . and How to Avoid Them*, John Wiley and Sons, 2010

Presentations

- Presenter, "Indigenous Intercultural Capacity and First Nations Wills and Estates" – Presented to various financial and investment institutions, Fall 2024
- Presenter, "First Nations Wills //First Nations Clients in Court//Building Indigenous Intercultural Capacity", Law Society of Ontario, Estates and Trusts Summit, October 2024

- Presenter, “Advising the Ultra High Net Worth Family”, Estate Planning Council of Toronto, October 2024
- Presenter, “Estate Administration of Estates of Indigenous Peoples”, Law Society of Ontario, Practice Gems, Administration of Estates Program, September 2024
- Presenter, “Forum for Trust Advisors to Ultra High Net Worth Clients”, Cambridge Forum (by invitation only), May 2024
- Presenter, “Estate Planning and Administration”, Osgoode Estate Planning and Administration Program, February 2024
- Presenter and Facilitator, “Advising the Modern Family”, Estate Planning Council of Toronto, October 2023
- Presenter, “Indigenous Trusts, Wills and Estates”, Estate Planning Council of Canada, September 2023
- Facilitator, “Complexities and Challenges of Facilitating Planning for the Modern Family”, Cambridge Forum for Trusted Advisors to UHNW Families, May 2023
- Presenter, “Indigenous Trusts and Estate Planning for Indigenous Peoples”, Estate Planning Council of London, March 2023
- Numerous presentations to First Nation clients and community information sessions regarding Shaping the Indigenous Trust, Drafting the Trust, Per Capita Distributions, the Role and Responsibilities of Trustees, and the Trust Ratification Process, 2021-2023
- Moderator, “Q&A with Financial Institutions”, Estate Planning Council of Toronto, February 2022
- Moderator, “Institute Across Borders: Legal Issues and Cross-border Best Practices for Ontario Lawyers from Around the World”, Ontario Bar Association Institute, November 2021
- Moderator, “Estate Planning Considerations”, Ontario Bar Association Institute, November 2021
- Co-Presenter, “Inter-vivos Discretionary Trusts: Selected Trust Issues”, Canadian Tax Foundation, October 2021
- Co-Presenter, “Pour Over Clauses”, Law Society of Ontario Estates and Trusts Summit, October 2021
- Co-Presenter, “Ulysses Contract: An Advanced Care Directive”, Estate Planning Council of Toronto, February 2021
- Presenter, “Not-for-Profit Governance”, presented to the Estate Planning Council of Toronto, December 2020
- Chair, ” Incentive Trusts, presented to the Estate Planning Council of Toronto, September 2020
- Co-Presenter, “What’s Really Going on Out There? Covid-19 and Beyond”, presented to national insurance company, June 2020
- Presenter, “Dealing with Farm Property in Estate Planning and Administration”, presented to trust company and investment firm, June 2020
- Co-Presenter, “Strategies for Execution of Estate Planning Documents in the COVID-19 Environment”, presented to large investment firm client, April 2020
- Co-Presenter, “Legal Issues and Challenges in Today’s Pandemic Environment”, presented to large institutional client, April 2020

- Presenter, “New Regulations to Facilitate Document Execution and Planning Opportunities in the Current Environment”, presented to large institutional client, April 2020
- Co-Chair, “New Decade: New Taxes? Update on U.S. Tax Law for Canadian Trusts and Estates Lawyers”, Ontario Bar Association Webinar, March 2020
- Co-Presenter, “Succession Planning using Trusts”, led seminar for Heirloom Family Office Caucus, February 2020
- Co-Presenter, “Shaping the Trust – Education, Consultation and Drafting: Have your Say”, National Aboriginal Trust Officers Association, May 2019
- Co-Presenter, “Tools for Optimizing your Estate Planning Practice and Career”, Ontario Bar Association, April 2019
- Presenter, “Effects of Re Milne Estate on Planning in Ontario”, October 2018
- Co-Presenter, “Estate and Tax Considerations with Dealing with Art”, December 2017, April 2018, September 2018
- Presenter, “Trips and Traps in Estate Administration,” Law Society of Ontario, September 2017
- Presenter, “The Ulysses Contract: An Advanced Personal Care Directive”, Institute of Law Clerks of Ontario, May 2017
- Presenter, “Contract Negotiations and Transactions: Planning for Contingencies of Incapacity and Death”, Law Firm, May 2016
- Presenter, “Navigating the Minefield: Dealing with Powers of Attorney in Business”, Young Commercial Lenders Association, April 2016
- Presenter, “Toronto Estate Planning Seminar: What Will Your Legacy Be?”, University of Alberta Alumni Association, November 2014
- Presenter, “Strategic Planning Refresh”, Board of the Calgary Immigrant Women’s Association, April 2014
- Presenter, “Adjudicator Education”, Law Society of Alberta, October 2013
- Presenter, “Creating a Strategic Plan”, Law Society of Alberta, February 2013
- Presenter, “Rationales, Strategies and Considerations in the Use of Testamentary Trusts”, Canadian Bar Association, Elder Law Section, January 2009
- Presenter, “Legal and Ethical Issues on a Client’s Mental Incapacity or Death”, Independent Financial Brokers, November 2009
- Presenter, “Legal and Ethical Issues on a Client’s Mental Incapacity or Death”, Alberta Fall Summit, November 2007

Published Works – Papers

- *Frye v. Frye Estate: A Refresher*, first published by the Canadian Tax Foundation in Vol. 22 no. 3 Tax for the Owner-Manager, July 2022, and republished by Thomson Reuters Canada, Taxes and Wealth Management, October 2022

- *Inter-vivos Discretionary Trusts: Selected Trust Issues*, Ontario Tax Foundation, Victoria Rodrigues and Nicole Woodward, October 2021
- *Benefits of Pour Over Trusts*, Law Society of Ontario Estates and Trusts Summit, October 2021
- *Tips and Traps in Estate Administration,* for Practice Gems: Administration of Estates 2017, Law Society of Upper Canada, September 2017

Memberships & affiliations

- Member, Society of Trust and Estates Practitioners (STEP), TEP designation
- Member, Toronto Lawyers' Association
- Member, American Bar Association
- Vice Chair and Newsletter Editor, Ontario Bar Association, Aboriginal Law
- Past President and Chair of Governance Committee, Estate Planning Council of Toronto, 2023-2024
- Member, Wills Estates and Trusts Executive, Canadian Bar Association, 2021 – present
- Past Chair, Trusts and Estates Section Executive Committee, Ontario Bar Association, 2022-2023
- Chair, Trusts and Estates Section Executive Committee, Ontario Bar Association, 2021-2022
- Vice Chair, Trusts and Estates Section Executive Committee, Ontario Bar Association, 2020 – 2021
- Secretary, Trusts and Estates Section Executive Committee, Ontario Bar Association, 2019 – 2020
- Technology Liaison, Trusts and Estates Section Executive Committee, Ontario Bar Association, 2018 – 2019
- Newsletter Editor, Trusts and Estates Section Executive Committee, Ontario Bar Association, 2015 – 2018
- Past Board member, The Salvation Army
- Past Vice-President, Merritt Rotary Club