



## Lori Duffy

### Senior Counsel

Toronto

[lduffy@mccarthy.ca](mailto:lduffy@mccarthy.ca)

t. 416-601-8295

### Bar Admission

Ontario 1984

### Law School

University of Ottawa

### Practices

Tax

Estates and Trusts

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Lori Duffy is a senior Trusts and Estates advisor in our leading Tax Group, based in Toronto.

With more than three decades of experience advising on all aspects of wills, trusts, and estate planning, Lori has earned a reputation as one of Canada's leading Estate and Personal Tax Planning experts. A testament to her deep knowledge and excellent client service, Lori has been named one of the top lawyers in Canada by *Best Lawyers* in her practice area, and is repeatedly recognized as a leading practitioner in Estate & Personal Tax Planning in the Canadian Legal Lexpert Directory.

A strategic advisor known for her innovative approach, Lori advises clients in managing and transferring their assets through the use of business succession plans, trusts and wills. Her wide-ranging practice also includes all areas of trusts, wills and estate administration, including work under the *Substitute Decisions Act*.

Lori is fully immersed in the wills, trusts, and estate planning ecosystem. She has authored a thought leadership newsletter and is the Ontario Editor of the Estate & Trust Reports (Carswell). Lori was also co-editor of the Ontario Bar Association Trusts and Estates section newsletter, and was the editor of *Without Prejudice*, the Women's Law Association newsletter (1989-91). She is a member of the Society of Trust and Estate Practitioners (STEP). In addition, she is the former Vice-Chairperson of the Real Property Section of the Ontario Bar Association. She has also been a seminar instructor at the Bar Admission Course, and has lectured in many seminars for the Canadian Bar Association, the Law Society of Ontario, the Canadian Institute, the International Bar Association, and regularly addresses community groups.

Lori is also a strong advocate for the advancement of women in the legal profession and in the business world. She is a Past President of the Canadian Association of Women Executives and Entrepreneurs; and a former member of the Executive of the Women's Law Association of Ontario.

Lori obtained her LL.B. from the University of Ottawa in 1982 and her LL.M. from Osgoode Hall Law School in 2009. She is called to the Bar in Ontario

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(1984). She earned an ADR Certificate of Achievement from the University of Windsor/Stitt in 2009, and she holds a BA in History from McMaster University (1979).

## Speaking Engagements:

- Speaker, "Plenary: Unique Issues for Blended Families with Business Interests", Ontario Bar Association - Ontario Legal Conference: Family, Trusts & Estates Law, February 8 and 9, 2023
- Speaker, "Estate Planning for Canadian Expats", Canadian Association of New York, Online, September 13, 2022
- Panelist, "Wills and Estates Refresher 2021", Law Society of Ontario, Online, April 14, 2021
- Panelist, "Serving the Family: Critical Insights on the Issues Impacting Families in Corporate, Estates and Family Law", OBA Institute Series, Online, February 3 and 4, 2021
- Speaker, "Financial Security and Estate Planning: Planning for the Inevitable", Verity Investment Club, September 11, 2018
- Panelist, Financial Empowerment of Women, Toronto, ON, March 8, 2018
- Speaker, "Estate planning for Women and Singles with no children", Leave A Legacy Information Series, Toronto Reference Library, Toronto ON, July 13, 2017
- Speaker, "Trusts in 2016-What do they look like?", 22nd East Region Solicitors Conference 2016, County of Carleton Law Association, May 13, 2016
- "Brain Health: The Changing Brain and Healthy Aging", Planned Giving Committee of Providence Healthcare Foundation, May 11, 2016

## Awards & Rankings

**Best Lawyers in Canada**

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Leading Lawyer: Trust and Estates

## The Canadian Legal Lexpert Directory

Leading Lawyer: Estate & Personal Tax Planning - Estate & Tax Planning

## Lexpert Zenith Award

Women Leaders in the Legal Profession, 2013