Dwight D. Dee, TEP

Associé | **Vancouver**

604.643.1239

ddee@millerthomson.com

Biographie

(Disponible en anglais seulement)

Dwight Dee, TEP, has a business law and estates and trusts practice with a focus on private client services. Dwight works with individuals and families in the areas of estate and incapacity planning, trusts, business succession planning, and elder law matters. Dwight also has extensive experience in all aspects of business law, particularly in the areas of capital markets, mergers and acquisitions, and public company compliance.

In his private client and trusts practice, Dwight regularly assists clients with the preparation of wills, enduring powers of attorneys, family trusts, spousal trusts, and healthcare representation agreements. He also advises individuals and institutional trustees on estate and trust administration. Dwight has significant experience working with Indigenous communities in drafting and advising on settlement and community trusts. He is recognized for his exceptional client service, expert knowledge and solutions-oriented approach.

Dwight is a frequent speaker and course Chair for the Continuing Legal Education Society of British Columbia. He is a member of the editorial board of the British Columbia Probate & Estate Administration Practice Manual published by CLE BC and is serving in the role of Deputy Chair for the executive of the Society of Trust and Estate Practitioners (STEP) – Vancouver Branch.

Réalisations professionnelles et leadership

- *The Best Lawyers in Canada* – Trusts and Estates, 2024
- 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

SERVICES CONNEXES

Marchés financiers et valeurs mobilières

Services aux particuliers

SECTEURS INDUSTRIELS CONNEXES

Énergie et ressources naturelles

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

Associations professionnelles

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

Formation et admission au barreau

- Colombie-Britannique, 2000
- LL.B., University of British Columbia, 1999
- B.A. (history and religious studies, first class), University of British Columbia, 1996