Joan Jung

Associate Counsel

Toronto, Waterloo Region

OFFICE

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Industries & Expertise

EXPERTISE

Corporate Tax | Private Client Services

Biography

BAR ADMISSION

Ontario, 1985

EDUCATION

- JD, University of Toronto, 1983

Joan, a seasoned lawyer at Miller Thomson Tax Group, focuses her practice on private corporation taxation, trusts, and estate planning. Her experience spans both domestic and international tax planning for owner-manager enterprises, offering invaluable guidance in succession planning.

Joan has given numerous guest lectures and presentations at prestigious events, showcasing her experience in tax law strategies. From intimate discussions to large-scale events, Joan continues to demonstrate her unwavering commitment to excellence and leadership in the legal realm.

With accolades from several esteemed industry organizations, Joan's reputation precedes her. She serves on various committees and has contributed significantly to tax publications, solidifying her status as an authority in tax law. Joan's influence and experience in the field are widely known and respected.

Industry involvement

Recognition

- *The Best Lawyers in Canada* – Tax Law, 2024-2026; Trusts and Estates, 2022, 2025-2026
- The Canadian Legal Lexpert Directory – Corporate Tax, 2024 – 2025; Estate & Personal Tax Planning, 2024 – 2025
- Editor, "*Tax for the Owner-Manager*" published by the Canadian Tax Foundation
- Past Governor and Past member of the Executive Committee, Canadian Tax Foundation
- Member of Annual Conference Planning Committee, Canadian Tax Foundation
- Member, Tax Technical Committee, Society of Trust and Estate Practitioners (Canada)
- Past Program officer and Past Newsletter officer, Toronto Branch, Society of Trust and Estate Practitioners (Canada)
- Volunteer of the Year Award, STEP Toronto, 2021

Thought leadership

- Guest Lecturer, "Intergenerational Share Transfers", Osgoode LLM program, July 25, 2023
- Co-presenter, "Life, Death, and Taxes: Planning Strategies for the Final Exit", CBA Tax Law for Tax Lawyers, June 2, 2023
- Co-presenter, "Insights and Obligations under section 237.4", Ontario Bar Association Professionalism and Ethical Issues for Tax Lawyers, December 8, 2022
- Co-presenter, "Matters of Interest to the Private Client Advisor", Estate Planning Council (Toronto), October 3, 2022
- Co-Chair and presenter, The Annotated Alter Ego and Discretionary Trust, Law Society of Ontario, January 26, 2022
- Author and presenter, "Dividend Planning," 2022 Ontario Tax Conference (Toronto: Canadian Tax Foundation, 2022), 7: 1-87
- Author, "Changing the Analysis for a Typical Spinout" (2022) 22:1 Tax for the Owner-Manager 2-4
- Co-presenter, Pipelines and Loss Carrybacks", STEP 2020 Speaker Series (Winner of Best Conference Presentation Award)
- Co-presenter, "Revisiting the use of Joint Partner/Alter Ego Trusts LSO Probate Essentials", September 23, 2021
- Presenter, "Advising Clients on Taxation", The Six Minutes Estates Lawyer, LSO, May 13, 2021

- Co-Author and co-presenter, “Surplus Stripping and Intergenerational Transfers of Business 2019 Conference Report” (Toronto: Canadian Tax Foundation, 2019) 18: 1-48
- Author and presenter, “Private Corporation Case Study: TOSI, AAII, NERDTOH and Other Letters of the Alphabet,” 2018 Ontario Tax Conference (Toronto: Canadian Tax Foundation, 2018), 6: 1-28
- Author and presenter, “The Taxable Preferred Share Rules and the Private Corporation,” in 2017 Ontario Tax Conference (Toronto: Canadian Tax Foundation, 2017) 12:1-23
- “Income and Payment: Key Trust Law and Income Tax Differences”, Estates Trusts & Pensions Journal, Vol 36 pp. 350-380 (August 2017)

Memberships & affiliations

- Canadian Tax Foundation
- Society of Trust and Estate Practitioners (Canada)
- Estate Planning Council (Toronto)
- International Fiscal Association
- Ontario Bar Association