



Kimberly A. Whaley, CS, TEP, LLM

LITIGATION PRACTICE

Kimberly A. Whaley is the founder and principal of the Toronto Boutique Trusts & Estates Litigation Firm, Whaley Estate Litigation Partners (WEL PARTNERS), having started her own law practice in 2005. Kimberly is also a Solicitor of the Supreme Court of England and Wales. Her practice is restricted to the resolution of estate and related disputes throughout Ontario including:

- Will, Estate & Trust Disputes
- Advising Fiduciaries
- Dependant's Support Claims
- Passing of Estate, Trustee, Attorney, Guardian & Fiduciary Accounts
- Capacity Proceedings
- Guardianships
- Power of Attorney Disputes
- Consent & Capacity Board Proceedings
- End-of-Life, Treatment Decisions & Medical Assistance in Dying
- Elder Law/Elder Financial Abuse
- Solicitor's Negligence
- Representation of Persons Under Disability
- Probate Applications
- Opinions
- Appeals
- Agency Services
- Approval Motions Under Rule 7

WEL MEDIATION

Kimberly is a qualified Mediator, mediating estate and trust related disputes within her practice areas.

RECOGNITIONS

- Designated as a Certified Specialist in Estates and Trusts Law by the Law Society of Upper Canada, 2006
- Distinguished Fellow of the Canadian Centre for Elder Law (CCEL), 2012
- Designated as a TEP, Society of Trusts and Estates (STEP) Worldwide, 2002
- Global Law Experts, (GLE) Trust & Estate Law Firm of the Year in Canada, 2016
- Corporate International Magazine Global Awards, Estate Litigation Lawyer of the Year in Canada, 2018
- Named in National Law Journal's List of Divorce, Trusts and Estates Trailblazers, May 2017
- Ranked annually by Canadian Lawyer since 2014 as one of the Top 5 Trusts and



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Estates Boutique Firms in Canada

- Peer selected annually since 2008 for inclusion in *The Best Lawyers™ in Canada* for work in Trusts & Estates
- Peer chosen by Lawday Leading Lawyers as one of the top 60 leading lawyers in Canada in Estates and Trusts
- Martindale-Hubbell – BV Distinguished Rating in both Legal Ability and Ethical Standards
- Lexpert ranked in the Canadian Lexpert Legal Directory, an acknowledgement of excellence by peers and colleagues
- Ranked in Chambers and Partners Canada as a leading lawyer, member of a select group at the very top of the profession in the area of Private Client Disputes, Contentious Trusts, and High Net Worth clients

AWARDS

- Awarded the OBA-Hoffstein Book Prize in 2009, recognizing contributions and achievements by Members of the OBA in Wills, Trusts, Estates, Writing and Teaching
- Inducted Fellow, Canadian Center for Elder Law (CCEL)
- Special Lecture Award Recipient, Queens University Law School

PROFESSIONAL ASSOCIATIONS AND MEMBERSHIPS

Current

- CBA Elder Law Executive, Section Chair, 2017
- OBA Elder Law Executive, Section Vice-Chair, 2017
- Civilian Co-Chair, Toronto Police Service Seniors Community Consultative Committee (TPS SCCC), Abuse of Older and Vulnerable Persons
- Past-Chair of the OBA Trusts & Estates Executive
- Past Member of the CLE Main Committee Executive
- Past Member of the OBA Awards Committee
- Past-Chair Toronto Branch of The Society of Trust and Estate Practitioners (STEP), Toronto, and Past Director of STEP CANADA, and was an Executive Member for 8 years on several sub-committees including Program Officer
- Full Member of STEP Worldwide as a Trust and Estate Practitioner
- Continuing Member of the STEP Canada National Conference Planning Committee
- Past Member of the Ontario Bar Association's JUST Editorial Board

- Honorary Member of The Professional Advisory Group of the BAYCREST Foundation
- Estate Planning Council of Toronto, Member
- Estate List Users Committee of the Ontario Superior Court of Justice at Toronto since its inception in 2003

TEACHING

- Appellate Advocacy, Queen's University, Adjunct Professor, receiving the Queen's University Special Lecturer Award
- University of Toronto Law School, Estates Course, Adjunct Professor
- Instructor, Osgoode Bar Admission Course, Trust & Estates
- Regularly presents at Continuing Legal Education programs for lawyers, in-house financial institutions, Institute of Law Clerks of Ontario (ILCO), hospitals, accountants, financial advisors and other community organizations and foundations, universities, colleges, Ontario and Toronto Police, community centers and libraries
- Maintains a teaching affiliation with the University of Toronto as a guest lecturer in a Sociology and Gerontology course on Law and Aging and on Financial Abuse of the Elderly

PUBLICATIONS

Publications include published books, legal journals and periodicals referenced on full CV and website:

<http://welpartners.com>

PERSONAL

Most rewarding achievement and outright passion is her daughter, Sammi, now age 19. Kimberly has an affection for cooking, baking, cycling with her Trek Cali SLX, and photography with her Nikon D800 and growing collection of lenses. Kimberly also runs marathons and other races in her spare time and has given up on her guitar lessons. Loves Bewitched, Audrey Hepburn and Peanuts – favorite is Snoopy! Favorite Movie: Breakfast at Tiffanys. Favorite Indulgence: fresh home baked hot Chocolate Chip Cookies