

SERVICE

Financial Institution Transactions

Strategic transaction expertise across the financial services sector



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As financial services businesses grow and expand, they engage in a range of complex transactions that require legal solutions. Osler's Financial Institution Transactions team has the experience and expertise to provide services and solutions that best meet the strategic and operational objectives of companies in the financial services space, including financial institutions, their investors and their counterparties.

Our team advises on a broad range of transactions covering a wide variety of sectors in the financial services space, including banking, insurance and reinsurance, credit unions, wealth and asset management, fintech/insuretech, payments and credit cards, loyalty programs, and bancassurance. Osler lawyers have unique insight into issues relating to the financial services industry, gained through our extensive deal experience and deep knowledge of the changing regulatory environment. The firm has advised on many of the largest and most complex financial services transactions in Canadian history.

The Financial Institution Transactions multidisciplinary team is represented by several practice areas, including [public and private M&A](#), [capital markets](#), [private equity](#), [pensions](#), [financial services](#), [asset management](#), commercial contracting, [tax](#), [disputes](#), [regulatory](#) and [intellectual property](#). Our experts collaborate seamlessly across practice areas to provide advice that is creative and practical for clients in planning and executing transactions.

The Osler team works with institutions involved in financial services of all sizes and at all stages of development. Our clients include large financial institutions, private equity houses, pension funds, fintechs, private capital and family offices, and other counterparties in financial institution transactions, such as retailers and loyalty program providers. Support is provided for both domestic and international transactions.

Key Contacts



CO-CHAIR

[\(Ricco\) A.S. Bhasin](#)

Partner, Corporate, Toronto, New York



CO-CHAIR

[Rosalind Hunter](#)

Partner, Corporate, Toronto