



## Hélène Gagné

Partner, Tax

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**Montréal**

(514) 904-5646

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Bar Admission: Québec, 2011

### Areas of Expertise

Tax: M&A, Reorganizations and Restructuring Transactions

Private Equity

Real Estate

Banking and Financial Services

Manufacturing

Technology

Media and Entertainment

Private Client Taxation

Tax Advisory Services

Private Client

Tax

Hélène is a partner in the Tax law group at the Montreal office, and co-leads the national Private Client practice. Her practice primarily focuses on tax, estate planning, as well as taxation of high-net-worth individuals, Wills and Estate and Trust Law.

During her career in leading law firms in Montréal, Hélène has developed strong relationships with high-net-worth individuals and private clients for whom she provides personalized tax and estate planning advice.

Hélène also counsels individuals, families, trustees of trusts, liquidators/executors, and family offices on all aspects of estate planning, estate administration, and wealth transfer planning. She works with a wide variety of domestic and international clients to address their planning needs and possesses significant experience with closely-held family businesses and the multi-generational families that own and control these businesses.

Hélène is a member of the Society of Trust and Estate Practitioners and is internationally recognized as a Trust and Estate Practitioner (TEP). She has also taught law courses at the Master of Laws (Taxation) at HEC Montréal, and regularly gives lectures on the topics of tax and estate planning and trust law.

Helena  
Gagne

## Awards and Recognition

- **Chambers High Net Worth – Canada:** Recognized in Private Wealth Law
    - *“Hélène is a specialist in trusts, estate planning and international tax.”*
    - *“Hélène is incredibly knowledgeable, very engaging and is a good source of information. She is practical and goal-oriented.”*
    - *“Hélène is an excellent adviser to ultra high net worth families.”*
  - **Canadian Legal Lexpert Directory:** Recognized in Corporate Tax; Estate & Personal Tax Planning – Estate & Tax Planning
  - **International Tax Review:** Recognized in Corporate Tax, Women in Tax leader
  - **Best Lawyers in Canada:** Recognized in Tax Law
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## Community Involvement

- Tax and Financial Planning Association, Organizing Committee Colloquium on Trusts
  - CHU Sainte-Justine Foundation, Member of the organizing committee – Urban Duathlon
  - Young Canadians in Finance, board member, former president of the Montreal chapter
  - STEP Canada, Executive Council Member
  - Association de planification fiscale et financière (APFF), board member
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## Credentials

### Education

- HEC Montréal, LL.M. Fisc.
  - University of Montréal, LL.B.
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### Languages

- English
  - French
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### Professional Affiliations

- Barreau du Québec
- Estate Planning Council of Canada

- STEP Canada
- Association de planification fiscale et financière (APFF)
- Canadian Tax Foundation (CTF)