

# Disability Planning

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Associate

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Max is a dedicated lawyer specializing in estate planning for families who have a loved one with a disability. With deep respect for dignity, autonomy, and inclusion, Max collaborates with individuals with disabilities, their families, and support networks to design legal plans that protect their futures and reflect what matters most to them.





## Approach

- Rooted in relationship-based, person-centered support that emphasizes inclusion, autonomy, and long-term security.
- Recognizes and honours each client's unique circumstances, values, and aspirations.
- Navigates the intersection of estate law, government benefits, and disability rights with clarity and care.
- Collaborates with financial advisors, support organizations, and community members to create holistic, coordinated plans.
- Offers trauma-informed, culturally safe, and accessible legal services including virtual meetings and plain-language communication.

## Legal Services

- Tailored wills and powers of attorney for families supporting individuals with disabilities.
- Establishment of discretionary trusts (inter vivos), Henson trusts (testamentary), and other specialized trusts.
- Supported decision-making frameworks and Section 7 Representation Agreements.
- Guardianship alternatives that promote dignity, autonomy, and self-determination.
- Tax and estate strategies that preserve eligibility for government disability benefits.
- Lifetime benefit structures and continuity-of-care planning.
- Advice on housing arrangements and tenancy rights in supported living contexts.
- Legal support for the creation and maintenance of microboards and other person-centered governance models.



## Disability Benefit Navigation & Financial Safeguards

- Assistance with Disability Tax Credit (DTC) and medical expense deduction eligibility.
- Guidance on CPP-D, PWD, RDSP, and other provincial and federal benefits.
- Support with benefit applications, audits, reviews, and appeals.
- Strategies to safeguard benefits while supporting long-term financial security.

## Commitment to Lifelong Planning

- Emphasizes that effective planning is ongoing, not just a response to crisis.
- Supports families through legal, financial, and relational succession planning especially as caregivers age.
- Encourages practical tools like Letters of Intent and intentional support networks to capture vital knowledge and preserve continuity.
- Builds legal frameworks designed to endure beyond any one individual, promoting lasting care, security, and community connection.

## Philosophy and Commitments

- Empathetic, inclusive legal practice that centers the voice of the person with a disability.
- Planning grounded in the five pillars of a good life: relationships, contribution, home, financial security, and decision-making.
- Legal work that protects autonomy and belonging not just legal compliance, but quality of life.
- Helps families move from uncertainty to clarity, strength, and peace of mind.
- Advocates for systemic change and inclusive public policy.
- Provides public legal education through webinars, workshops, and plain-language resources.
- Active member of legal organizations focused on disability, elder law, and estate planning.