



Samantha Y. F. Wu

Partner

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Office

Toronto

Expertise

- Tax & Trusts
- Private Client
- U.S. Cross-Border

Biography

Samantha Y.F. Wu is a partner in the Tax & Trusts Group at Cassels. Samantha's practice focuses on cross-border Canadian and US tax, estate planning, and real estate matters. She is licensed in Ontario and New York. Samantha offers niche experience with tax and estate planning for high net-worth individuals and families with assets and/or beneficiaries in both US and Canada, cross-border real estate transactions, and US probate and settlement of estate matters.

Samantha's areas of expertise include providing detailed, personalized tax and estate plan analysis for high-net worth clients which involve issues and planning considerations for multi-jurisdictional probate, incapacity issues, exposure to US estate tax, planning for deemed-disposition at death in Canada, and implementation of complex wills and trusts.

She also advises clients on buying and selling US real estate, on the transactions themselves as well as advising on the cross-border tax consequences, withholding obligations under the *Foreign Investment in Property Tax Act* (FIRPTA), and income filing obligations. She handles transactions ranging from personal use condominiums to multi-million-dollar luxury properties.

Samantha also offers a full Ontario estate and tax planning practice, which includes advising on and implementing wills, trusts, powers of attorney, and the probate and tax considerations in Canadian estate planning.

Samantha received her law degree from the Benjamin N. Cardozo School of Law at Yeshiva University in New York City in 2010, and was admitted to the New York Bar in 2011. She practiced law in New York before returning to Canada in 2012 and was admitted as a member of the Law Society of Ontario in 2015.

Prior to joining Cassels, Samantha was a partner at an international law firm that specializes in providing sophisticated cross-border and domestic tax, estate planning, immigration, and real estate legal services to high net-worth individuals.

Education / Bar Admissions

- J.D., Benjamin N. Cardozo School of Law, Yeshiva University, 2010
- B.A, University of British Columbia, 2007
- New York, 2011
- Ontario, 2015

Associations

- National Association of Asian-American Professionals
- STEP Canada (Society of Trust and Estate Practitioners)