Equitable™

Bryan T. McNulty, LL.B., B.B.A, T.E.P.

Head of Tax and Estate Planning

Bryan has been working in the life insurance industry since 2010, joining Equitable in 2017. He has over 25 years' experience in tax and estate planning for entrepreneurs and high-net-worth individuals.

Bryan develops and implements advanced estate and tax planning strategies. He collaborates with advisors, accountants, and lawyers to deliver value-added services to a select group of clients in the business and affluent markets.

Prior to his work in the life insurance industry, Bryan was a tax lawyer, the leader of the Tax Group, and a member of the Wills, Estates and Trusts Group at the largest law firm in Peel Region. Before that, Bryan spent over 11 years at a major accounting firm, providing tax and estate planning advice to high-net-worth individuals.

In these two prior roles, Bryan advised his clients and their families on business succession, tax reduction, and estate planning. He drafted wills and family trusts to help clients achieve their objectives. He also specialized in Canada-U.S. cross-border estate planning for American citizens or individuals who own property in the United States.

Bryan, called to the Ontario bar in 1997, is a graduate of Osgoode Hall Law School and Wilfrid Laurier University. He is a member of the Society of Trust and Estate Practitioners (STEP) and a member of the Conference of Advanced Underwriting (CALU) Associates' Committee. Bryan was also on the board of directors of both the Estate Planning Council of Mississauga and the Toronto Branch of STEP.

Bryan has spoken at conferences for the Law Society of Upper Canada (now the Law Society of Ontario), the Ontario Bar Association, CALU, STEP and the Canadian Institute of Chartered Accountants. He has taught the taxation section at the School of Accountancy run by the Institute of Chartered Accountants of Ontario, and he has authored articles for Canadian Tax Highlights.