

Barrett Schultz

Associate

403.896.1774

bschultz@mcleod-law.com

OFFICE: DOWNTOWN



ASSISTANT

Melissa Furlong

403.254.3686 MFurlong@mcleod-law.com

PRACTICE AREAS

Wills, Trusts & Estates

Personal Tax Planning

Business Law

Corporate Tax

Barrett is an associate in the Tax Group at McLeod Law LLP. His passion for tax started long before he began his journey into law. He believes that everyone deserves dedicated legal representation when navigating the complicated, and sometimes frustrating, Canadian tax system. Barrett knows that this level of service begins with a commitment to lifelong learning as tax laws and regulations continually evolve and change. He also understands that great legal service extends beyond technical knowledge and includes the ability to communicate effectively and respectfully with clients, the Canada Revenue Agency, opposing parties and anyone else involved in each tax planning situation.

Barrett's main areas of practice are domestic and international corporate, personal, estate and succession tax planning, including mergers & acquisitions, public offerings, estate freezes, federal & provincial tax credits and tax-exempt organizations. He enjoys working collaboratively with clients, corporate counsel, accountants, financial advisors and other professionals, in order to develop bespoke advice for each client's individual needs.

In his spare time, you can find Barrett adventuring with his fiancée, Elayna, and their dogs, Max and Juneau, or trying to fix his slice on the golf course.

Education

2019 University of Calgary (B.A. with Distinction)

2022 University of Alberta (J.D.)

Experience

Barrett's practice focuses on corporate and international tax planning, including corporate reorganizations, mergers & acquisitions, public offerings, and Canadian federal and provincial carbon/green energy tax & offset credits. Alongside this, he has also serviced clients in the charitable and tax-exempt sectors, including registered charities, non-profit organizations and professional bodies. Barrett also has experience advising on personal, estate and succession planning matters, such as estate freezes and post mortem pipelines.

Memberships

- Law Society of Alberta
- Canadian Bar Association Southern Alberta
Tax South Section
- Canadian Bar Association
- Canadian Tax Foundation
- Canadian Petroleum Tax Society

Community

- University of Calgary Scholars Academy Alumni Association
Co-President, 2021-Present