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Whitney is a securities lawyer who advises clients in the investment and wealth management industry.

She has particular expertise in advising investment fund managers, advisers and dealers on the development, distribution and ongoing administration of investment products and services. Whitney has extensive experience structuring investment products and assisting fund managers with bringing new investment products to market, including exchange-traded funds, mutual funds, private funds and other investment vehicles.

Whitney works closely with clients to plan and execute significant, high value strategic business changes, including securities registrant consolidations, fund mergers, investment objective changes, fund administrator conversions, change of manager mandates, exchange migrations and other fundamental changes to investment products and services. She also regularly advises clients on regulatory and compliance matters affecting funds, including sales practices, independent review committees and conflict of interest matters.

Whitney also acts as securities regulatory counsel on M&A transactions, including completing diligence to assess regulatory risk and compliance, drafting and negotiating transaction documents and preparing post-closing compliance remediation reports. As an advocate, Whitney regularly represents clients on exemption applications and has been engaged on several industry advocacy initiatives requiring innovative regulatory solutions and compelling advocacy and submissions to securities regulators. She also advises clients on a wide range of commercial law matters in the investment management industry, outsourcing transactions, commercial contract negotiations and corporate governance matters.

Whitney is a member of the firm's Environmental, Social and Governance steering committee.

Experience

- U.S.-based tech company: Advising a leading U.S.-based technology company in its acquisition of a Canadian quantum computing business.
- Fidelity Investments Canada ULC: Advising Fidelity in relation to the launch of bitcoin funds in Canada
- Canadian Hedge Fund Manager: Advising a hedge fund manager in relation to its merger with a Toronto-based alternative investment fund manager.
- Canadian Investment Fund Manager: Advising an investment fund manager in relation to the sale of its retail investment fund and portfolio management business.
- Restaurant and Hospitality Group: Advising a prominent Canadian restaurant and hospitality group on various acquisitions, divestitures and strategic partnerships.
- U.S. Private Equity Firm: Acting as Canadian counsel to a U.S. private equity firm in connection with the \$2.3 billion acquisition of a global supplier of rigid packaging products and services.
- U.S. Private Equity Firm: Acting as Canadian counsel to a U.S. private equity firm in connection with the \$2.4 billion acquisition of a North American manufacturer of rigid metal and plastic containers used to package industrial, bulk food and retail goods.
- Various Canadian- and U.S.-based Investment Fund Managers: Advising numerous Canadian and U.S.-based investment fund managers in the launch and ongoing administration of their exchange-traded fund platforms, including exchange-traded funds structured as alternative mutual funds.
- Various Canadian- and U.S.-based Investment Fund Managers: Advising numerous Canadian and U.S.-based investment fund managers in the launch and ongoing administration of retail mutual funds.
- Various Investment Fund Managers: Advising numerous investment fund managers in obtaining exemptive relief from securities law requirements in connection with structuring and administering various exchange-traded fund, mutual fund and pooled fund products.
- U.S.-based Investment Fund Manager: Advising a U.S.-based investment fund manager in the launch of its mutual fund and pooled fund platforms in Canada.
- U.S.-based Investment Dealers and Advisers: Advising U.S.-based investment dealers and advisers in connection with obtaining registration under Canadian securities legislation.
- Canadian Securities Intermediary: Advising a Canadian securities intermediary and its board on a variety of corporate governance and compliance related matters.
- Canadian Bank: Acting as Canadian counsel to a Canadian bank on a global outsourcing transaction in connection with outsourcing functions related to its investment fund products and portfolio management services.
- Canadian Biomedical Company: Advising on sale to portfolio company of a prominent global private equity firm.
- U.S. Ingredients Production Company: Advising U.S.-based ingredients production company on acquisition of a Canadian plant-based protein company.
- U.S. Mining Company: Advising U.S.-based mining company on equity investment in Canadian mining project.

Insights & Events

- Autrice, « 35 years of ETFs: The evolution of a Canadian innovation », article de BLG, mars 2025
- Autrice, « Feuille de route ESG de BLG : apprentissages du cabinet juridique de référence au Canada », article de BLG, avril 2024
- Autrice, « 18-year check up: Continuous disclosure review and guidance for IRCs », article de BLG, avril 2024

- Autrice, « La CVMO publie ses directives à l'attention des émetteurs de fonds d'investissement et de produits structurés », article de BLG, novembre 2023
- Autrice, « Examen par les ACVM : pleins feux sur les fonds négociés en bourse », article de BLG, octobre 2023
- Autrice, « Reduced regulatory burden for investment funds and managers - progress for 2022 », article de BLG, février 2022
- Autrice, « Conflicted over how to identify and address conflicts? », article de BLG, mars 2021
- Autrice, « BLG Represents First Bitcoin Market Participant to be Approved by Canadian Securities Administrators », article de BLG, septembre 2017

Beyond Our Walls

Professional Involvement

- Member, Law Society of Alberta
- Member, Law Society of Ontario
- Board of Directors, Canadian Exchange-Traded Fund Association

Awards & Recognition

- Recognized in the 2025 edition of *The Canadian Legal Lexpert® Directory* (Investment Funds & Asset Management).

Bar Admission & Education

- Ontario, 2013
- Alberta, 2019
- BA (Hons.), Université Queen's, 2009, English Literature, B.A. in Political Studies
- JD, Faculté de droit Osgoode Hall de l'Université York, 2012

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Borden Ladner Gervais S.E.N.C.R.L., S.R.L. (BLG) est le plus grand cabinet d'avocats canadien véritablement multiservices. À ce titre, il offre des conseils juridiques pratiques à des clients d'ici et d'ailleurs dans plus de domaines et de secteurs que tout autre cabinet canadien. Comptant plus de 725 avocats, agents de propriété intellectuelle et autres professionnels, BLG répond aux besoins juridiques d'entreprises et d'institutions au pays comme à l'étranger pour ce qui touche les fusions et acquisitions, les marchés financiers, les différends et le financement ou encore l'enregistrement de brevets et de marques de commerce.

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