

Advising the Estate Trustee in Turbulent Times

Description:

What are the challenges facing estate trustees in this fluctuating and uncertain economy? What advice can and should lawyers offer in the administration of estates to protect their clients? This program will examine these issues and include the key topics of realization of assets, the prudent investor rule, dealing with insolvent and bankrupt testators and estates, and related tax issues. Experts in the field will share with you valuable insights and practical suggestions for managing the turbulent times your clients find themselves in.

Taped from the October 1, 2009 CLE Program.

Highlights

- How to determine priorities between creditors
- Challenges in valuing assets
- Utilizing tax losses and a refresher on trustee filing requirements
- Guidance on how to develop investment plans
- Comments from LawPRO on how to manage risk in an estates practice

Video Replay Agenda

Realizing Estate Assets and the Duty to Account
A. Sean Graham, Eisen Graham

Applying the Prudent Investor Rule
Gerald W. Owen, The Bank of Nova Scotia Trust Company

Dealing with Insolvency and Bankruptcy Issues
Philip J. Gertler, Gertler & Koven

Tax Considerations
Bryan T. McNulty, Pallett Valo LLP – Mississauga

Risk Management
Pauline R. Sheps, LawPRO
Brendan D. Bowles, Glaholt LLP

Thursday, November 5, 2009

10:00 a.m. – 1:00 p.m. (approx.)
Library - Frontenac County Court House
5 Court St.

KINGSTON

Contact:
Jacqueline Hassefras
613-542-0034

Includes Materials and Lunch

Please go to page 2 for complete registration information.

For more information on this and other programs please visit the OBA website at: www.oba.org/pd





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Video Replay – Kingston Registration Information

Date: Thursday, November 5, 2009

Time: Starting at 10:00 - 1:00 pm (approx.)

Location: Library - Frontenac County Court House, 5 Court St.

Price: Includes materials and lunch*

_____ \$75 + \$3.75 GST = \$78.75 (FLA Members and their staff)

_____ \$100 + \$5.00 GST = \$105.00 (Non-Members)

**registrations must be received at minimum a week prior to the program to guarantee materials.*

Please register through the Frontenac Law Association at:

Phone - (613) 542-0034 or Fax – (613) 531-9764

Please note that Payment is by Cheque ONLY

**Please make cheques payable to: Frontenac Law Association and mail
to the FLA, Frontenac Court House, 5 Court St. , Kingston, ON, K7L 2N4**

Name: _____

Firm: _____

Address: _____

City/Postal Code: _____

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