

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

Wednesday, November 18, 2009

4:30 p.m.
 Law Library
 County Court House
 860 William St.

COBOURG

Contact:
Anne Bowers
905-372-1382

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 – Cobourg Registration Information

Date: Wednesday, November 18, 2009

Time: Starting at 4:30 p.m.

Location: Law Library, County Court House, 860 William St., Cobourg

Price: **Includes materials***

_____ \$95 + \$4.75 GST = \$99.75 (Members of OBA and/or Law Association)

_____ \$140 + \$7 GST = \$147.00 (Non-Members)

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

Name: _____

CBA Membership # (if applicable) _____ County _____

Firm: _____

Address: _____

City/Postal Code: _____

E-mail: _____

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Payment: Cheque (made payable to OBA) Visa and Mastercard accepted

Credit Card # _____ Exp. _____

Signature: _____

CONTACT INFORMATION CONSENT

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This form should be completed and returned together with your cheque made payable to:

ONTARIO BAR ASSOCIATION 300-20 Toronto St., Toronto, Ontario M5C 2B8. Registrations will be accepted by FAX at (416) 642-0424 or phone 1 800 668-8900 or (416) 869-1047.

Reservations and cancellations will be accepted up to 2 working days prior to the program, subject to a \$26.75 administration charge. *Although extra materials are always provided, registrations must be received a week prior in order to guarantee materials. If materials are not available a copy will be mailed to you after the program. If you reserve and do not attend, you will be invoiced. OBA GST registration # R100760495

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