Registration Details

2010-2011 Trusts and Estates Passport

CBA# ________________________ Name: ______________________________

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HST #R100760495

REGISTER BY SEPTEMBER 28, 2010

Return form together cheque made payable to:

Ontario Bar Association | 300-20 Toronto Street | Toronto, ON | M5C 2B8

or FAX your registration to 416.642.0424

All registrations must be prepaid.

PASSPORT PRICING:

Attendance Option	CBA Member	CBA Law School / Articling Students Members
❑ In person	$198 (plus HST= $223.74)	$135 (plus HST= $152.55)
❑ Webinar	$198 (plus HST= $223.74)	$135 (plus HST= $152.55)

*Includes 5 lunch programs ☐ Vegetarian Option

The Trusts & Estates Award Dinner requires separate registration

Refunds are **not available** for the Trusts & Estates Passport

All programs will take place at the OBA Conference Centre

The Sections Program Passport is available to section members only.

Benefits of purchasing the Trusts and Estates Passport

- Take advantage of the discounted fee
- One single easy payment
- Quick, easy email attendance confirmation
- Can't attend a program, you can transfer your registration*
- Quality CLE and great networking opportunities

Please note the following

Passport registrants **must** confirm with the OBA before each program that they will be attending (a minimum of two days prior to program date).

*If you are not able to attend a program, you may send a substitute in your place. The substitute must be an OBA member from your firm.

ONTARIO BAR ASSOCIATION
A Branch of the Canadian Bar Association

L'ASSOCIATION DU BARREAU DE L'ONTARIO
Une division de l'Association du Barreau canadien

Trusts & Estates Law

The Passport to the Best in Trusts & Estates Programming

SECTION PROGRAMS PASSPORT

All programs will be held at the Ontario Bar Association Conference Centre.

For additional information: www.oba.org
or by phone 416-869-1047 (Toll Free 1-800-668-8900)

Life Insurance Trusts & Beneficiary Designations in Ontario after *Carlisle* & *Taylor*

Tuesday, September 28, 2010 l 12:00 pm Registration followed by lunch program

Program Chair: **Joanna. J. Ringrose,** C.S. (Estates and Trusts Law) Oakville

Speakers: **Mary MacGregor,** Dickson MacGregor Appell LLP
Kathryn Bennett, MD Insurance Agency Limited
Blair L. Botsford, Miller Thomson LLP (Waterloo)

Case Comment on a recent decision of significance to Trusts & Estates practitioners:
Diane A. Vieira, de Vries Litigation

Life Insurance Trusts & Beneficiary Designations in Ontario:

- A Review of the impact of the *Carlisle* & *Taylor* decisions in Ontario
- Distinction between a "named beneficiary" under the *Ontario Estates Administration Tax Act* and a "beneficiary" under the *Ontario Insurance Act*
- Potential risks of naming a trustee as the beneficiary
- Related creditor protection issues

Working with the Accountant of the Superior Court of Justice and the Office of the Children's Lawyer

Thursday, November 25, 2010 l 12:00 pm Registration followed by lunch program

Program Chairs: **Jane Martin,** Eisen Graham, Barristers & Solicitors

Speakers: **Laurie Redden,** Deputy Public Guardian and Trustee
Linda Waxman, Legal Director, Property Rights, Office of the Children's Lawyer

Case comment on a recent decision of significance to Trusts & Estates Practitioners:
Angelique Moss, de Vries Litigation

- Legislative authority for payment into court
- The Role of the Accountant of the Superior Court of Justice in trusts and estates, capacity, guardianship and *Absentee Act* proceedings
- How to use the ASCJ – procedure and precedents
- The relationship between the Office of the Children's Lawyer and the ASCJ with respect to minor's funds
- Using the fiat procedure to access minor's funds held by the ASCJ
- Advising clients about when to use the ASCJ versus when to have a guardian of property appointed
- Precedents and procedures

Update on Costs and the Rules of Civil Procedure

Tuesday, February 22, 2011 l 12:00 pm Registration followed by lunch program

Program Chair: **Sender B. Tator**, Schnurr Kirsh Schnurr Oelbaum Tator LLP

Speakers: **Edwin Upenieks,** Lawrence, Lawrence, Stevenson LLP
Jane Martin, Eisen Graham, Barristers & Solicitors

Case Comment on a recent decision of significance to Trusts & Estates practitioners:
David Lobl, Fraser Milner Casgrain LLP

- Review of historical jurisprudence re: costs in estates matters
- Review of recent decisions which highlight the "new" trend when awarding costs in estates matters
- The need for "proportionality"
- How these recent costs decisions will affect estates and trusts practitioners
- A review of recent amendments to the Rules of Civil Procedure
- A discussion of recent decisions highlighting the implementation of these amendments to the Rules of Civil Procedure
- How these amendments may affect the conduct of contentious estates and trusts matters in the future

2011 Essential Income Tax Update

Tuesday, March 29, 2011 l 12:00 pm Registration followed by lunch program

Program Chair: **Susannah Roth,** O'Sullivan Estate Lawyers

Speakers: **Angela M. Ross, LLB,** Associate Partner, Tax Services, High Net Worth Group, Price Waterhouse Coopers LLP

Case comment on a recent decision of significance to Trusts & Estates Practitioners:
Elizabeth Bozek, Schnurr Kirsh Schnurr Oelbaum Tator LLP

Save yourself aggravation and save your clients tax! Angela M. Ross will review income tax case law, legislative changes and CRA administrative developments from the past year which could (or will) have a significant impact on estate planning and estate administration., as well as those portions of the 2011 Federal Budget of interest to estates and trusts practitioners. Don't miss this essential review of the latest judicial, legislative and administrative trends in this area.

Capacity Assessments

Wednesday, April 13, 2011 l 12:00 pm Registration followed by lunch program

Program Chair: **Melanie A. Yach,** Aird & Berlis LLP

Speakers: **Dr. Carole A. Cohen,** Geriatric Psychiatrist and Professor in the Department of Psychiatry at University of Toronto, Consultant to Capacity Assessment Office at the Ministry of the Attorney General
Marshall Swadron, Swadron Associates

- Overview of the various types of capacity assessments (e.g. current vs. retrospective, testamentary capacity vs. capacity to manage property or make personal care decisions)
- Considerations in retaining a capacity assessor
- Effectively instructing capacity assessors
- The use of capacity assessments in estate planning
- The use of capacity assessments in contested guardianship applications, will challenges and other estate and trust litigation