Court orders and settlements in estate litigation can have unplanned tax consequences that may have a significant negative impact on the result you achieve for your client. Find out how to identify the potential pitfalls and gain a complete understanding of the tax implications of the settlements you reach and orders you seek. Register now to improve your ability to help your clients accomplish their goals and avoid unnecessary tax costs.

8:30am  Registration and Coffee

9:00am  Welcome and Opening Remarks
- Why it is imperative for you to understand tax ramifications in estate litigation

9:15am  Making Sense of Tax Consequences Related to Particular Assets When Settling Your Case
- Clarifying the principal residence exemption
- What are the tax implications of deemed dispositions
- How to avoid valuation problems
- Ensuring compliance with inter-spousal transfer requirements
- When to involve accountants and other tax professionals
  Erica Baron, McCarthy Tétrault LLP
  Marie-Eve Gosselin, Thorsteinssons LLP

10:15am Potential Tax Problems and Opportunities in Will Challenges
- Pros and cons of having an Estate Trustee During Litigation (ETDL)
- How to address post-mortem tax planning
  Caroline Abela, WeirFoulds LLP

10:55am Networking Break

11:10am Key Strategies for Settling Dependant’s Relief Claims in a Tax Efficient Manner
  - Exploring the use of spousal rollovers for settling dependant relief claims
  - Advantages and disadvantages of block versus periodic payments
  Debra Stephens, Goddard Gamage Stephens LLP
  Brian Wilson, Wilson Vukelich LLP

12:00pm Effectively Utilizing the Doctrine of Rectification
  - What are the scope and limits of the doctrine of rectification?
  - Unravelling the essential elements of a rectification claim
  - Best practices for bringing your application
  - Who owns assets “charged” as security?
  Matthew Williams, Thorsteinssons LLP

12:50pm Questions and Closing Remarks

1:00pm Program Concludes