ONTARIO BAR ASSOCIATION
A Branch of the Canadian Bar Association

OBA | Professional Development

Critical Advanced Estate Planning Issues

Trusts and Estates Law

In-Person   Webcast

Date: Tuesday, November 21, 2017| 1:30 pm to 5:00 pm

Location: Twenty Toronto Street Conferences and Events
20 Toronto Street, 2nd Floor, Toronto

Program Chairs: **Sara Beheshti**, O'Sullivan Estate Lawyers LLP
Amanda Stacey, Miller Thomson LLP

Substantive Hours: This program is eligible for up to **3h 00m**

Professionalism Hours: This program is eligible for up to **0h 30m**

Take your estate planning practice to the next level with this essential program. Get up to speed on the implications of new tax changes, and unravel the complexities of cross-border complications. Our expert faculty with share valuable insights and helpful advice on how to navigate these and other tricky estate planning issues to help you bring maximum value to your clients.

Register now to secure your spot. We look forward to seeing you there!

1:30pm Welcome and Opening Remarks

1:35pm **Probate Planning Strategies to Minimize Estate Administration Tax**
Lindsay Ann Histrop, Gardiner Roberts LLP

- Exploring common and uncommon techniques to reduce EAT
- How to avoid unintended pitfalls and potentially disastrous post mortem consequences

2:10pm **Essential Cross-Border Planning Considerations**
Christine Perry, Keel Cottrelle LLP

- When should an inter vivos or testamentary trust be employed in the cross border context?
- Analyzing "estate tax compliant" trusts for U.S. beneficiaries
- Potential complications you need to watch out for

2:45pm **Critical Impacts of the Fair Tax Plan for Your Clients**
Sunita Doobay, Tax Chambers LLP

The Government of Canada's Fair Tax Plan is anticipated to be effective on January 1, 2018. Ensure you are up to speed on the implication of these tax changes on your clients' estate plans, including:

- Multiplying the lifetime capital gains exemption through family trusts
- Holding passive income in a private corporation
- Dealing with income splitting

3:25pm Networking Break

3:40pm **What Planners Need to Know about Tricky Issues in Trust Taxation**
David Stevens, Gowlings WLG

4:15pm **Professionalism Issues for Planners – From a Litigator's Perspective**
Lisa Filgiano, Miller Thomson LLP

- Expert strategies to navigate conflicts of interest and joint retainers
- Timely completion of wills and relevant limitation periods for estate planners
- Discharging the duty to probe clients and investigate facts

4:50pm Questions and Concluding Remarks

5:00pm Program Concludes

PROGRAM REGISTRATION IS ONLINE www.oba.org/pd

Questions? pd@oba.org