ONTARIO BAR ASSOCIATION
A Branch of the Canadian Bar Association

OBA | Professional Development

Wills and Estate Planning: A Primer

Trusts and Estates Law / Young Lawyers Division

In-Person Webcast

Date: Tuesday, November 21, 2017 | 9:00 am to 12:30 pm
Location: Twenty Toronto Street Conferences and Events
20 Toronto Street, 2nd Floor, Toronto

Program Chair: **Emily Hubling,** Goodmans LLP

This program contains 1 Professionalism Hour
This program is eligible for up to 2.5 Substantive Hours

The OBA has been approved as an Accredited Provider of Professionalism Content by The Law Society of Upper Canada.

Preparing a will and developing an estate plan requires a critical knowledge of various areas of law, as well as tax obligations and implications. To ensure your client's intention is ultimately fulfilled, careful planning and drafting is essential. Gain a fundamental understanding of the need-to-know issues, and take home practical tools and strategies to implement in your practice. Learn how to manage your clients' expectations, avoid costly errors and protect yourself. This program is a must for those in the early stages of their Wills and Estates practices, and for experienced practitioners looking to brush up on these important basics. Register now to secure your spot!

8:30 am Registration and Coffee

9:00 am Welcome and Opening Remarks

9:05 am **What You Need to Do before Meeting with Your Client**
Risa Awerbuck, Torkin Manes LLP
Emily Hubling, Goodmans LLP
- Tried and tested strategies to prepare for the meeting
- Effectively using checklists and other information gatherers
- Getting paid: managing your client's expectations early and other helpful advice for handling payment

9:35 am **Best Practices for the Initial Client Meeting**
Jordan Atin, Hull & Hull LLP
- Retainers agreement essentials
- Advising spouses: when is a joint retainer, independent legal advice or independent representation appropriate?
- Navigating capacity concerns
- Managing family dynamics

10:05 am **Practical Advice for Tackling Challenging Planning Issues**
Laura Kerr, Low Murchison Radnoff LLP (Ottawa)
- Help, my client has foreign assets
- What you need to know about using trusts in a will
- Dealing with assets passing outside of the estate
- How to use dual wills to limit estate administration tax, and other tax complications

10:40 am Networking Break

10:55 am **How to Prepare Powers of Attorney (POAs)**
Alicia Natividad, ASN Law Professional Corporation (Ottawa)
- Key principles in POAs for personal care and for property
- My client has asked me to prepare a living will. What is that?
- Opportunities and obstacles in limited POAs and restrictions in POAs

11:20 am **Expert Guidance on Drafting Wills**
Genevieve Giroday, Giroday Law Professional Corporation
- Tricky pitfalls to avoid
- How to use precedents and delegation to maximize efficiency, while maintaining standards
- Mastering the potential trouble spots: from foreign executors, to second marriages, to dependants, and more
- Making the most of codicils and other useful testamentary documents

11:55 am **Finalizing the Will and Next Steps**
Heather Mountford, Goddard Gamage LLP
- Signing the will and other execution requirements
- What are your obligations in storing wills and POAs?
- Parting advice to your client: updating wills and other crucial considerations
- What to include in your reporting letter

12:20 pm Q&A/Closing Remarks

12:30 pm Program Concludes

PROGRAM REGISTRATION IS ONLINE **www.oba.org/pd**
Questions? pd@oba.org