ONTARIO BAR ASSOCIATION
A Branch of the Canadian Bar Association

OBA | Professional Development

Estate Planning for Blended Families

Trusts and Estates Law

In-Person Webcast

Date: Monday, October 29, 2018| 9:00 am to 12:30 pm

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

Program Chairs: **Ambie Edgar-Chana,** Edgar Chana Law Professional Corporation
Brittany Sud, Fasken Martineau DuMoulin LLP

Professionalism Hours: This program contains **0h 30m**
Substantive Hours: This program is eligible for up to **3h 00m**

The OBA has been approved as an Accredited Provider of Professionalism Content by The Law Society of Ontario

Blended families are becoming increasingly common in Canadian society. Estate planning for these blended families can create particular challenges for lawyers, as clients seek to balance the interests of children from previous relationships with those of new spouses. Join us to gather expert advice and helpful strategies on how to handle the unique intricacies of this family type. Our exceptional faculty will share practical advice on how to avoid undesired consequences and ensure your client's wishes are respected.

8:30 am Registration and Coffee

9:00 am Welcome and Opening Remarks

9:05 am **Best Practices for Representing Blended Families**
Ambie Edgar-Chana, Edgar Chana Law Professional Corporation

- What are the pros and cons of proceeding on a joint retainer basis?
- Critical drafting advice: what should be included in your retainer?
- How to sever a single retainer and enter into a joint retainer or vice versa
- Exploring potential conflict and/or prejudice to clients in joint retainer
- Red flags to watch out for

9:35 am **Effectively Using Trusts, Mirror Wills and Mutual Wills**
M. Elena Hoffstein, Fasken
Brittany Sud, Fasken

- When are mirror wills, mutual wills and spousal trusts appropriate?
- Exploring the use and implications of inter-vivos trusts to prevent challenges, exclude assets from the estate, and otherwise achieve your client's goals

10:10am Questions

10:20am Networking Break

10:35 am **Dealing with the Tax Complications of Your Client's Estate Plan**
Adam Gotfried, McMillian LLP
Gregory Sanders, Perley-Robertson Hill & McDougall LLP (Ottawa)

- Weighing the benefits and drawbacks of a rollover of property to a spouse
- How to identify and address a potential mismatch of tax on RRSPs, RRIFs, cottages and more
- Key opportunities and considerations when transferring assets outside of the estate to avoid probate tax

11:35 am **Making Sense of Potential Impacts of Family Law on Blended Family Planning**
Karon Bales, Bales Beall LLP

- What estate practitioners need to look out for when there is a domestic contract in place with the current or former spouse
- In what circumstances can domestic contracts be set aside?
- When does the spousal election under section 5 of the *Family Law Act* apply, and what is the impact for your estate plan?

12:10 pm Questions and Closing Remarks

12:30 pm Program Concludes

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

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