Estate Planning for Blended Families

Date: March 12, 2019

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

Original program was held on October 29, 2018

AGENDA

Welcome and Opening Remarks from the Program Chairs

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

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

Break (15 Minutes)

Substantive Hours: This program contains 3h 00m
Professionalism Hours: This program contains 0h 30m

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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

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 6 of the Family Law Act apply, and what is the impact for your estate plan?

Closing Remarks

Substantive Hours: This program contains 3h 00m
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