Estate Planning Toolkit

OBA Trusts & Estates Law

In-Person Webcast

Date: Wednesday, April 10, 2019| 1:30pm – 4:30pm

Location: OBA Conference Centre
20 Toronto Street, 2nd Floor, Toronto, M5C 2B8

Program Chairs **Sara Beheshti**, Barrister & Solicitor
Birute Luksenaite, Portfolio Estate Law

This program is eligible for up to 0.5 Substantive Hours
This program contain 2.5 Professionalism Hours

Careful estate planning requires both practical skill and broad knowledge of various legal issues. Examine essential topics, and gain tools and strategies for developing a successful estate planning practice. Attend to hear seasoned practitioners share their expertise on client intake and retainer issues, conducting effective interviews, drafting skills, protecting your file, as well as practice and career management. Whether you are a lawyer starting their estate planning practice or an experienced practitioner looking to brush up on essential skills, join us to sharpen your knowledge. Register now to secure your spot!

1:00 pm **Registration**

1:30 pm **Welcome and Opening Remarks**

1:35 pm **Retainers and Client Intake**
Lindsay Histrop, Gardiner Roberts LLP
- Retainer letters and limiting your retainer
- Joint retainer issues
- Intake procedures and forms, including client identification
- Initial consultations

2:00 pm **Conducting Effective Interviews**
Jordan Atin, Hull & Hull LLP
- Eliciting information in the interview
- Working with clients who give imperfect information or instructions
- Addressing potential capacity issues
- Use of questionnaires, technology and follow-up communications

2:25 pm **Drafting Tips and Traps**
Brian Gillingham, Cunningham Swan Carty Little & Bonham LLP
- Best drafting practices for new practitioners
- Dealing with special assets
- The use of trusts and other complex estate planning
- Avoiding common drafting errors

2:50 pm **Networking Break**

3:05 pm **Reporting Letters and other Post-Execution Matters**
Marni Pernica, Aird & Berlis LLP
- Reporting letters and post-execution documentation
- Execution issues and failure to observe formalities
- Advising clients on changes to the law
- Updating estate planning documents

3:30 pm **Safeguarding Your Estate Planning File**
Debra Stephens, WEL Partners
Kathryn Balter, Fogler, Rubinoff LLP
- Avoiding common mistakes and protecting your file
- Safekeeping and release of wills and client documents
- Use of discretions/escrow instructions to clarify terms for storing powers of attorney
- How to handle challenging relationships with third parties, including referral sources, professional advisors and family members

3:55 pm **Tools for Optimizing Your Estate Planning Practice and Career**
Nicole Woodward, Dentons Canada LLP
Emma Hamilton, O'Sullivan Estate Lawyers LLP
- The use of precedents and technology
- Document safeguarding, file storage and digitization
- Checklist, ticklers and workflow management tools
- Marketing your legal practice
- Tips and advice on mentorship and networking

4:25 pm **Questions and Concluding Remarks**

4:30 pm **Program Concludes**

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