

## The Family Cottage: Estate Planning and Real Estate Issues

*OBA Trusts & Estates Law*



**Date:** Monday, June 17, 2019 | 9:00 am – 11:00 am

**Location:** OBA Conference Centre  
20 Toronto Street, 2<sup>nd</sup> Floor, Toronto



**Program Chair:** Noah Weisberg, Hull & Hull LLP

This program is eligible for up to 2 Substantive Hrs

Cottage ownership has exploded in popularity. Whether it is a prospective owner looking to enter the market, an established owner looking for succession and estate planning advice, or family members disputing possession, new and challenging cottage-related matters are an increasing component of your practice. Join our expert faculty to optimize your understanding of the issues as they cover cottage estate planning principles and fundamental topics such as disputes, conveyancing, litigation, as well as real estate and family law considerations. Keep pace with the cottage boom by equipping yourself with the insight you need to advise clients who retain you for cottage estate planning or litigation.

8:30 am Registration

9:00 am Welcome and Opening Remarks

9:05 am **The Cottage in Estate Planning**  
**Emily Hubling, Fasken**

- Dispositions and forms of holding
- The right to purchase
- Tax issues: income tax, capital gains, principal residence, estate administration tax
- Advising heirs

9:25 am **Conveyancing**  
**Marni Pernica, Aird & Berlis LLP**

- Transmission application
- Transfer by personal representative
- First dealings
- Survivorship applications
- Vesting

9:45 am **Cottage Disputes**  
**Ian Hull, Hull & Hull LLP**

- Cottage appraisals and fair market value assessments
- Co-ownership arrangements that go wrong
- Cottage use during an appeal of judgement

10:00 am Networking Break

10:10 am **Unique Issues posed by Foreign Vacation Homes**  
**Jenny Pho, Dale & Lessmann LLP**

- High level discussion on the essentials when advising on the foreign vacation home

10:20 am **Using Insurance for Tax Purposes**  
**Jonah Mayles, Sterling Park Financial Group**

- Strategies and suggestions for maximizing returns

10:30 am **Real Estate Issues**  
**Mark Gelfand, KFG Law**

- Title merger and adjoining lots
- *Planning Act* changes

10:40 am **Family Law Implications**  
**Eric Sadvari, Goldhart & Associates**

- The cottage as a matrimonial home
- Equalization of cottage value
- The cottage in domestic agreements/marriage contracts

10:55am Questions and Concluding Remarks

11:00 am Program Concludes

**PROGRAM REGISTRATION IS ONLINE** [www.oba.org/pd](http://www.oba.org/pd)  
Questions? [pd@oba.org](mailto:pd@oba.org)