ONTARIO BAR ASSOCIATION
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OBA | Professional Development

Wills and Estate Planning: A Primer

Trusts and Estates Law / Young Lawyers Division

In-Person Webcast

Date: Monday, November 4, 2019 | 1:30 pm to 5:00 pm

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

Program Chairs: **Laura Cardiff,** Casey & Moss LLP
Robin Spurr, CIBC - Legal Division

This program contains 1 Professionalism Hours
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 Ontario.

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!

1:00 pm Registration and Coffee

1:30 pm Welcome and Opening Remarks

1:35 pm **Case Comment**
Maria Salman, Arkin Furrow Estate Law LLP

1:50 pm **Best Practices for the Initial Client Meeting**
Jordan D. Oelbaum, Schnurr Kirsh Oelbaum Tator LLP

- Information gathering and using checklists
- Retainers and engagement agreement essentials
- Advising spouses: when is a joint retainer, independent legal advice or independent representation appropriate?
- Navigating capacity concerns
- Managing family dynamics
- Getting paid: managing your client's expectations early and other helpful advice for handling payment

2:30 pm **Practical Advice for Tackling Challenging Planning Issues**
Heather Mountford, TD Wealth
Robert Santia, Aird & Berlis

- Anticipating and planning for tricky tax issues
- 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

3:10 pm Networking Break

3:25 pm **How to Prepare Powers of Attorney (POAs)**
Pia Hundal, Dentons Canada LLP

- 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

3:50 pm **Expert Guidance on Drafting Wills**
Rebecca Fisch, RSF Law
Genevieve Giroday Warren, Giroday Law Professional Corporation

- Pitfalls to avoid
- How to use precedents and delegation to maximize efficiency, while maintaining standards
- Making the most of codicils and other useful testamentary documents

4:25 pm **Finalizing the Will and Next Steps**
Rebecca Studin, de VRIES Litigation LLP
Emily Hubling, Fasken Martineau DuMoulin 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

4:50 pm Q&A/Closing Remarks

5:00 pm Program Concludes

PROGRAM REGISTRATION IS ONLINE **www.oba.org/pd**

Questions? pd@oba.org

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