

Utilizing Real Estate Transfers for Estate Planning Purposes

Elder, Real Property, Taxation, and Trusts & Estates Law Sections



Zoom Webcast

Date: Wednesday September 30, 2020 | 12:00 pm – 2:00 pm

Location: Zoom Webinar Only

Agenda: 12:00 pm – 2:00 pm Program



Professionalism Hours: This program contains a total of 15 minutes

Substantive Hours: This program contains 1h and 45 minutes

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

Real estate transfers can be effectively utilized in estate planning to help achieve your clients' goals. However, it is essential that you are up to speed on the many substantive and practice issues that can arise when transferring real property in these circumstances. Join us to explore the potential pitfalls and key considerations, and gather best practices for protecting both your clients and yourself.

Program Chairs: **Birute Luksenaitė**, Portfolio Estate Law
Darren Lund, Miller Thomson LLP

12:00pm Welcome, Opening Remarks and Introduction

1:15pm Break

12:10pm **Critical Considerations When Representing Older Clients**

Jane Martin, Jane Martin Law
Audrey Miller, Elder Caring Inc.
Alex Procope, Perez Bryan Procope LLP

- Understanding residential and care costs in elder years to better advise your clients before transferring title of assets
- Identifying red flags for financial abuse and undue influence, and how things can go wrong.

1:20pm **Best Practices for Advising Clients on Real Estate Transfers for No Consideration**

Ray Leclair, LawPro
Tannis Waugh, Barrister & Solicitor

- Making sense of the real estate options
- Essential advice for navigating your professional obligations

1:50pm Questions and Concluding Remarks

12:40pm **What You Need to Know About Tax Implications and Utilizing Trusts**

Todd Louie, Quantum Business Law
Rahul Sharma, Miller Thomson LLP

- Opportunities and challenges for holding real estate, including a principal residence, in trust
- Valuable advice for using bare trusts and nominees
- From land transfer tax to income tax: Exploring the tax implications

2:00pm Program Concludes

	CBA Member	CBA Student Member	Non-Member
Webcast	\$99*	\$50*	\$152*

***Plus applicable taxes**

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