

Common Estate Planning Pitfalls and How to  
Avoid Them: Advice from Estate Litigators

OBA Trusts and Estates Law Section



Webcast

Date: Tuesday, November 24, 2020 | 9:00 am to 12:30 pm

Location: Zoom webinar only

Agenda: 9:00 am Program begins  
12:30 pm Program concludes



Substantive Hours: This program contains 3 hours and 30 minutes

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A good estate plan will achieve your client’s objective and avoid disputes at the time of administration. To minimize the likelihood of litigation down the road, join us to explore the most frequently litigated issues and where the common pitfalls lie. Our faculty of estate litigators will share valuable insights to assist you in providing top-notch advice and enhancing your drafting skills to better dispute-proof your clients’ estate plans. Whether you are a general practitioner or estate planning specialist, do not miss this valuable opportunity to hear from those who see how estate planning can go wrong.

Program Chair: Hershel Sahian, Wagner Sidlofsky LLP

9:00 am	Welcome and Opening Remarks	11:10 am	Health Break
9:05 am	Mastering Powers of Attorney and Guardianship Jennifer Krotz, Melville Krotz Lawyers	11:15 am	Dealing with Life Insurance, Separation Agreements and Dependant’s Support David Freedman, Associate Professor, Queen’s University, Faculty of Law
9:35 am	Common Will Drafting Problems David Wagner, Wagner Sidlofsky LLP	11:45 am	Critical Tax Considerations and Other Estate Planning Challenges Anna Balinsky, KPMG Law LLP Wesley Isaacs, Grewal Guyatt LLP Alaina Spec, KPMG Law LLP
10:05 am	Health Break	12:15 pm	Questions and Concluding Remarks
10:10 am	Guarding Against Capacity Concerns and Undue Influence Amelia Yiu, Elm Law	12:30 pm	Program Concludes
10:40 am	Managing Joint Ownership and the Presumption of Resulting Trust Alex Procope, Perez Bryan Procope LLP		

	CBA Member	CBA Student Member	Non-Member
Webcast	\$200*	\$75*	\$302*

\*Plus applicable taxes