ONTARIO BAR ASSOCIATION A Branch of the Canadian Bar Association

OBA | Professional Development

Tax Considerations for Estates Planners: Key Issues and Helpful Strategies

Trusts and Estates Law Section

Webcast

Date: October 22, 2021 | 9:00am – 12:00pm

Location: Zoom webinar only

Law Society of Ontario accredited CPD

This program contains:
0hr 30 m of **Professionalism Content**
2 hr 30m of **Substantive Content**

Program Chairs: **Emily Hubling,** Fasken Martineau DuMoulin LLP
Darren Lund, Miller Thomson LLP

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

The importance of understanding the tax consequences of the estate plan cannot be overstated because of the significant tax liability that can arise both in an estate and for the beneficiaries of an estate. Our expert faculty will provide critical insights on tax obligations that arise on the death of the testator and the tax treatment of some of the most commonly used estate planning tools. Don't miss the opportunity to learn tax and estate planning strategies to ensure that your client's estate is set up in a way that is most favourable to your client and their beneficiaries.

9:00 am Welcome and Opening Remarks

9:05 am **Taxation Considerations on Death**
Maureen Berry, Fasken Martineau DuMoulin LLP
Matthew Getzler, Minden Gross LLP
- Planning for the deemed disposition on death
- Principal Residence Exemption
- Registered plans

9:40 am **Estate Administration Tax**
Alaina Spec, KPMG Law
- What assets are subject to the tax?
- Use of dual wills and other planning options

10:05 am Questions

10:10 am Break

10:25 am **Taxation of Trusts**
Joan E. Jung, Minden Gross LLP
- Testamentary and inter vivos trusts
- Special purpose trusts – Alter Ego Trusts/Joint Partner Trusts/Spousal Trusts
- Principal Residence Exemption in trusts
- New reporting obligations for trusts

11:00 am **Taxation Odds and Ends**
David Stevens, Gowling WLG
- Taxation of foreign property, testators, beneficiaries
- Land Transfer Tax
- Charitable gifts

11:30 am **Practical Advice for Advising on Tax Issues in Estate Matters**
Raymond G. Adlington, Miller Thomson LLP
- Common mistakes and how to avoid them
- Papering your file
- Using a checklist
- Reporting to the client

11:55-12:00 – Questions/closing remarks

Member	Non-Member	Student
$204.00*	$308.00*	$77.00

***Plus Applicable Taxes**

PROGRAM REGISTRATION IS ONLINE www.oba.org/pd

Questions? pd@oba.org

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