

## Critical Tax Considerations for Property Issues in Family Law

Family Law Section and Taxation Law Section



Webcast

**Date:** Friday, November 04, 2022 | 9:00 am to 1:00 pm

**Location:** Webcast only

**Program Chairs:** **Birute Luksenaitė**, Portfolio Estate Law (Toronto)  
**Christine Marchetti**, Christine Marchetti, Marchetti Lee LLP Family Law (Burlington)



**Substantive Hours:** This program contains up to 4 hours.

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

When negotiating and resolving property issues in family law matters, the tax consequences can be complex and significantly impact your clients' financial interests.

Join our expert faculty as they provide critical tax considerations when valuing and transferring assets to satisfy equalization and other property disputes. Our distinguished family and tax law professionals will also provide practical tips on how to effectively account for tax issues in your domestic contracts and minutes of settlement.

Don't miss this opportunity to solidify your tax knowledge of property division and equalization and unravel this complicated but vital aspect of family law.

9:00 am	Welcome and Opening Remarks	11:35 am	<b>Helpful Clauses and Drafting Tips</b> <b>Kavita V. Bhagat</b> , Family Law Solutions (Brampton) <b>James Rhodes</b> , Taxation Lawyers (Kitchener) Our expert faculty will provide helpful insights on specific clauses and legislative considerations to ensure that your domestic contract or minutes of settlement are consistent with tax legislation and result in the equalization and property division arrangements intended by your clients.
9:05 am	<b>Valuation of Assets</b> <b>Mitchell Ornstein</b> , Ornstein Valuations Ltd. (Toronto) <b>Katherine Shadbolt</b> , Perley-Robertson, Hill & McDougall LLP (Ottawa) <ul style="list-style-type: none"><li>Tax considerations when valuing assets</li><li>Dealing with "double dipping" with income earning assets</li><li>Tax peculiarities of specific assets</li></ul>	12:35 pm	<b>Taxpayer Relief Programs and Remedies</b> <b>James Rhodes</b> , Taxation Lawyers (Kitchener) How can you address unintended tax consequences after the fact? Join us for a discussion on potential solutions and specific tax relief programs offered by CRA.
10:00 am	<b>Spousal Rollover and Attribution</b> <b>Melanie Russell</b> , Kalex Valuations Inc. (Toronto) <b>Geoffrey Wells</b> , MacDonald & Partners LLP (Toronto) When do the spousal rollover and attribution rules apply and end in the face of a separation? What happens if the sale of the matrimonial home occurs before a divorce is finalized? Hear insights on how tax rules for spouses impact how you might structure your agreements and domestic contracts.	12:55 pm	Questions and Concluding Remarks
10:30 am	<b>Equalization and Property Transfers</b> <b>Tim Martin</b> , Verity Valuation Group Inc. (Toronto) <b>James Rhodes</b> , Taxation Lawyers (Kitchener) <ul style="list-style-type: none"><li>What types of transfers will garner tax consequences</li><li>Notional costs of disposition</li><li>Tax implications of transferring businesses and using holdcos and trusts</li></ul>	1:00 pm	Program Concludes
11:15 am	Health Break		

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