ONTARIO BAR ASSOCIATION
A Branch of the Canadian Bar Association

OBA | Professional Development

Wills and Estate Planning: A Primer

Trusts and Estates Law / Young Lawyers Division

Webcast

Date: Thursday, September 15, 2022 | 9:00 am to 12:30 pm

Location: Webinar Only

Program Chairs: **Jessica Alves**, Buset LLP (Thunder Bay)
Lisa Toner, Sorbara Law (Waterloo)

LAW SOCIETY OF ONTARIO accredited CPD

Professionalism Hours: This program contains a total of 1 hours and 0 minutes
Substantive Hours: This program contains 2 hours and 30 minutes
The OBA has been approved as an Accredited Provider of Professionalism Content by The Law Society of Ontario.

To ensure that your clients' intentions are ultimately fulfilled, careful estate planning and will drafting is essential, requiring knowledge of various areas of law and an understanding of tax obligations and implications.

Gain a fundamental understanding of the need-to-know issues that arise in wills and estate planning. Learn how to manage your clients' expectations, limit your liability and avoid costly errors.

This is a can't-miss program for those in the early stages of their Wills and Estates practices, and for experienced practitioners looking to brush up on these important basics and learn practical tools and strategies to implement in your practice.

9:00 am Welcome and Opening Remarks

9:05 am **What You Need to Do before Meeting with Your Client**
Shaheynoor Talukder, Talukder Law Professional Corporation (Toronto)
- Tried and tested strategies to prepare for the meeting, including ways to prepare for virtual meetings
- Effectively using checklists and other information gatherers
- Getting paid: managing your client's expectations early and other helpful advice for handling payment

9:35 am **Best Practices for the Initial Client Meeting**
Elikem Deley, Sorbara Law (Waterloo)
- Retainer agreement essentials
- Advising spouses: when is a joint retainer, independent legal advice or independent representation appropriate?
- Choosing your executor: tips to share with your client
- Navigating capacity concerns
- Managing family dynamics
- Effectively incorporating virtual meeting considerations

10:05 am **Practical Advice for Tackling Challenging Planning Issues**
Marly Peikes, O'Sullivan Estate Lawyers LLP (Toronto)
- Help, my client has foreign assets
- Dealing with assets passing outside of the estate
- How to use dual wills to limit estate administration tax, and other tax complications

10:40 am Networking Break

10:55 am **How to Prepare Powers of Attorney (POAs)**
Alexandra Manthorpe, Cunningham, Swan, Carty, Little & Bonham LLP (Kingston)
- 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

11:20 am **Expert Guidance on Drafting Wills**
Michael Rosen, Borden Ladner Gervais LLP (Toronto)
- Tricky pitfalls to avoid
- How to use precedents and delegation to maximize efficiency, while maintaining standards
- Mastering the potential trouble spots: from foreign executors, to second marriages, to dependants, and more

- Making the most of codicils and other useful testamentary documents

11:55 am **Finalizing the Will and Next Steps**
Laura E. Geddes, Siskinds Law Firm (London)

- Signing the will and other execution requirements, including virtual modifications/accomodations
- What are your obligations in storing wills and POAs?
- Parting advice to your client: updating/changing wills and other crucial considerations
- What to include in your reporting letter

12:20 pm Q&A/Closing Remarks

12:30 pm Program Concludes

300-20 Toronto St. Toronto, ON M5C 2B8 | Toll Free: 1-800-668-8900 | Tel: 416-869-1047 | Fax: 416-642-0424