ONTARIO BAR ASSOCIATION
A Branch of the Canadian Bar Association

OBA | Professional Development

Your Estate Planning File: From Retainer to Reporting Letter

Trusts and Estates Law and Young Lawyers Division

Webcast

Date: Tuesday, July 23, 2024| 9:00 am to 1:00 pm

Location: Online

Program Chairs: **Zara Wong,** Casey & Moss LLP
Liza Saad, Saad Estate Law PC

CPD

Substantive Hours: This program contains up to **3h 30m**.
Professionalism Hours: This program contains up to **0h 30m.**
The OBA has been approved as an Accredited Provider of Professionalism Content by the Law Society of Ontario

Careful planning and good drafting are essential to ensuring a testator's intentions are fulfilled. Join our outstanding faculty for advice and insights into the key issues in estate planning. Learn how to manage your clients' expectations, limit your liability, and avoid costly errors. Whether you are in the early stages of your Wills and Estates practice or are simply looking to brush up your skills, you won't want to miss out on this essential program. Register now to secure your spot!

8:30 am — Registration and Coffee

9:00 am — Welcome and Opening Remarks

9:05 am — **Before the Initial Client Meeting**
Ryan MacNeil, Cunningham, Swan, Carty, Little & Bonham LLP
- Preparing for the meeting and anticipating questions the client will ask
- Effective use of checklists and other materials
- Getting paid: managing expectations and advice for handling payment

9:35 am — **During the Client Meeting**
Katherine Holden, Goddard Gamage LLP
Hannah Gladstone, CARREL+Partners LLP
- Identifying the client and confirming the scope of the retainer
- Advice for virtual meetings
- Joint retainers and considerations for spousal wills
- Key questions and information to gather
- Tips for documenting advice and instructions

10:05 am — **Common Planning Issues and Pitfalls to Avoid**
Namratha Sankar, Bales Beall LLP
Katy Basi, Basi Law PC
- Navigating capacity and avoiding undue influence
- Selecting an Estate Trustee: tips to share with your client
- Basics of probate planning, including the use of multiple wills

10:45 am — Health and Networking Break

11:00 am — **Unique Family Law Issues**
David Henderson, Agro Zaffiro LLP
Nadia Bechai, Bechai Law
- Understanding family dynamics, including blended families
- Second marriages
- Dependent support
- Joint ownership and family law considerations.

11:30 am — **Expert Guidance for Drafting Wills**
Hilary Van de Kamer, Robinsons Law
Darren Lund, Fasken Martineau DuMoulin LLP
- Effective use of precedents
- Pitfalls to avoid
- Mastering potential trouble spots (e.g., foreign estate trustees, charitable giving, specific gifts, avoiding abatement, etc.)

12:25 pm — **Finalizing the Will and Next Steps**
Matthias Duensing, Duensing Law
Sanaya Mistry, WeirFoulds LLP
- Signing the will and other execution requirements, including virtual modifications/accommodations
- 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

12:55 pm — Q&A and Concluding Remarks

1:00 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