Registration Information

CPD Savings Program

*Green Discount

Save $50 on the price of any OBA CPD **live** program when you opt for **electronic** materials. To download your program materials, just visit www.oba.org/pd and select "Login". Discount does not apply to webcast programs and videostream.

Webcast Group Discount Per Program

Two to four registrants receive 25% off entire registration fee. Each additional registration thereafter for a half-day program is $50 or $75 for a full-day per person.
Available only to those registering from the same firm, at the same time and paying with one cheque; printed materials available for purchase at time of registration will be $50 per binder.

Regional Travel Participation Discount

Travelling more than 100 km to attend the **live** OBA CPD program? Take 25% off the registration fee.
Joint LSUC-OBA programs are exempt.

Can't Attend the Program?

Order the Material!

Concise, practical and well-focussed program materials and/or precedents written by the faculty (topic may vary slightly from presentation) are available either in binder format or electronic format (downloadable).

Publications   Live Webcasts

REGISTRATION POLICY
Registrations must be prepaid. Registrations will be accepted by FAX at (416) 642-0424 and at the Ontario Bar Association address shown on the Registration Form. A credit card number must accompany all faxed registrations. Walk-in registrations will be accommodated only if accompanied by credit card or cheque. Seating and meal preference, if applicable, will be given to prepaid registrants.

REFUNDS AND CANCELLATIONS
Course fee is refundable (less $50.00 plus $6.50 HST) if notice is received in writing five business days before the course. We reserve the right to cancel or reschedule courses, refuse admission, or change speakers, location or content at any time. No refunds will be made if notification is received after May 3, 2011. Please note that a CBA member in the same category may attend in your place. If the delegate is not a CBA member s/he will be required to pay the difference in fee. The **OBA HST registration number is R100760495**.

CONTACT INFORMATION CONSENT
The OBA's programs may be supported by preferred suppliers, sponsors and exhibitors. Subject to the following paragraph, I understand that the provision of contact information on this registration form constitutes my consent to such information being disclosed to the preferred suppliers, sponsors, exhibitors, speakers or attendees of this program. For further information about the CBA's and OBA's treatment of contact information, see Members Privacy Policy at www.cba.org or www.oba.org. By checking this box ☐, I do not wish my contact information disclosed to the preferred suppliers, sponsors, exhibitors, speakers or attendees of this program.

11TRU0510D

Registration Form

Beyond Will and Estate Planning Essentials

Tuesday, May 10, 2011 | 1:00 pm to 5:00 pm

Name: ____________________

CBA #: ____________________

Firm: ____________________

Address: ____________________

City: ____________________

Postal Code: ____________________

Bus. Tel. #: (   ) ____________________

Fax #: (   ) ____________________

E-mail: ____________________

REGISTRATION *Please check fee category.*

Live Program	CBA Member	CBA Student Member	Non-Member
❑ In person plus binder	$195	$95	$295
❑ In person plus E-materials Green Discount *	$145	$45	$245
❑ Webcast plus E-materials	$145	$45	$245
❑ Video Stream (archived)	$145	$145	$185

***with this option, you print the program materials yourself**

To order:
PROGRAM MATERIALS ONLY *(Available 3-4 weeks post-program)*

Publication	CBA Member	Non-Member
❑ Publication (binder) ❑ Publication (download)	$75	$120

FEE CALCULATION

Sub-Total	________	**New Sub-Total**	________
Less Discounts	________	Add HST (13%)*	________
		Total	________

*Ontario Registrants

PAYMENT *(registrations must be prepaid)*

❑ Cheque (payable to Ontario Bar Association), or please charge my

❑ Visa   ❑ Mastercard

Credit Card #____________________Exp. Date_____

Signature ____________________

Ontario Bar Association, 300 - 20 Toronto St, Toronto, ON M5C 2B8
Fax: 416.642.0424 Phone: 416.869.1047 Toll Free: 1.800.668.8900
www.oba.org/pd

OBA Professional Development

Live   Webcast

Program Chair:
Joanna J. Ringrose,
Barrister and Solicitor – Oakville

Program Chair:
Edward Olkovich,
Edward Olkovich Law Professional Corporation

Tuesday, May 10, 2011
1:00 pm to 5:00 pm

OBA Conference Centre
200–20 Toronto St., Toronto

Approved For LAWPRO CPD Premium Credit

accredited cpd

4 Total CPD Hours
1.5 Professionalism Hours
4 New Member Hours

Beyond Will and Estate Planning Essentials

Focus: This half-day program is an in-depth review of intermediate and advanced will and estate planning topics, including emerging practice issues and approaches to difficult drafting and planning situations. Experts in the field will share valuable insights and practical suggestions to assist you in helping your clients to meet their estate planning goals, while helping you to manage risk.

Highlights:

- Assessing capacity and vulnerability
- Mutual wills and difficult planning situations
- Registered disability savings plans and related planning
- Registered plan designations, insurance declarations and trusts
- Business succession planning
- Professionalism, profit and claims prevention practices

accredited cpd
This program has been accredited by the Law Society for 1.5 hour(s) toward the annual Professionalism Requirement.
This program has been accredited by the Law Society for 4 hour(s) toward the annual New Member Requirement..

ONTARIO BAR ASSOCIATION
A Branch of the Canadian Bar Association

L'ASSOCIATION DU BARREAU DE L'ONTARIO
Une division de l'Association du Barreau canadien

Beyond Will and Estate Planning Essentials

Tuesday, May 10, 2011 | 1:00 pm to 5:00 pm

OBA Conference Centre | 200–20 Toronto St., Toronto

1:00 pm INTRODUCTORY REMARKS

1:05 pm ***Assessing Capacity and Vulnerability***

- Helpful tips and tools to assist in assessing capacity and vulnerability
- A review of differing levels of capacity required for wills and for granting or revoking powers of attorney
- Assessments by the drafting lawyer and role of the attending physician or capacity assessor
- Deathbed wills and other dangerous dilemmas

***M. Jasmine Sweatman**, Sweatman Law Firm – Oakville*

1:30 pm ***Mutual Wills and More***

- Distinguishing mutual wills from mirror, joint, and reciprocal wills
- The core of the doctrine of mutual wills
- Why we all need to know this stuff - social change and relevance
- Recent cases from Canada and the Commonwealth
- Practical applications?
  - Strategies and approaches to difficult planning situations
  - Key considerations in blended family situations
  - Understanding and crafting mutual wills/mutual will agreements

Mary-Alice Thompson, *Cunningham Swan Carty Little and Bonham LLP – Kingston*

1:55 pm ***Designations and Declarations—Landmarks and Landmines***

- Registered plans (distinctions when dealing with insurance and non-insurance products
- Pros and cons of including registered plan designations in wills
- Beneficiary designations when there are locked-in plans
- Successor annuitants – what are they and why should you care?
- Rolling registered plans into trusts—where are we now?
- Insurance beneficiary declarations vs. insurance trusts
- Jointly owned insurance—insurance trust traps
- Creditor protection considerations

Barry Corbin, *Corbin Estates Law Professional Corporation*
Kathryn Bennett, *MD Insurance Agency Limited*

2:35 pm ***Registered Disability Savings Plans and Related Planning***

- Will and estate planning considerations in relation to RDSPs
- Henson Trusts and Registered Disability Savings Plans
- Setting the stage for the "rollover" of registered plans to disabled beneficiaries
- Planning for rollovers from RRSPs to RDSPs

***Mary Louise Dickson, QC,** Dickson MacGregor Appell LLP*

3:00 pm BREAK

3:15 pm ***Business Succession Planning***

- Review of unique opportunities to reduce and/or defer tax for clients operating their own business through a corporation (including many professionals)
- Alternative corporate succession methods
- Quantifying the benefit of an estate freeze and addressing some specific problem areas that frequently arise in the context of estate freezes
- Addressing the benefit of a "wasting freeze" and outline the appropriate analysis to be followed in the context of a post-mortem wind-up or transfer

Colin S. Smith, *Thorsteinssons LLP*

3:45 pm ***Professionalism, Profit and Claims Prevention Practices***

A Review of Ethics and Defensive Practice Tools in An Estate Planning Context

- Do existing professional rules operate effectively and appropriately in the estate planning context?
- Time frame standard of care for completion of a will: how is the case law developing?
- Defensive practice: protective steps to minimize exposure to a professional breach and liability claims in providing timely service
- "Dynastic" estate planning and multi-representation; identifying conflicting interests—"who is my client?"— the need for clarity
- Protocols to follow where interests may or do diverge

***Margaret O'Sullivan,** O'Sullivan Estate Lawyers*

Success Strategies for Your Estate Planning Practice

- How to increase your profitability
- Using your website strategy to generate more qualified leads
- Using checklists to improve profitability
- Why improving your interview skills will lead to better client communications and help your bottom line
- Using the power of specialization—why focusing is key and how to do it

Edward Olkovich,
Edward Olkovich Law Professional Corporation

Landmines for Lawyers: Managing Client Expectations

- Scope of the will-drafter's retainer
- Drafting wills under pressure
- Can you say 'no'?

Sean Lawler, *Shibley Righton, LLP*

4:45 pm QUESTIONS

5:00 pm PROGRAM CONCLUDES