



THE HAMILTON LAW ASSOCIATION *presents...* **The 10th Annual Estates & Trusts Seminar**

THURSDAY, FEBRUARY 16, 2012 - 1:00p.m. to 5:00p.m.

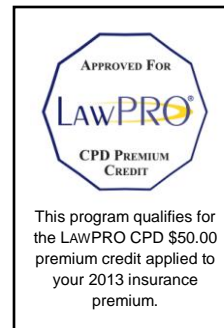
Sheraton Hamilton Hotel – Centre/East Ballroom (116 King Street West)

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Co-Chairs: **Adam Cappelli**, Cambridge LLP;
David Henderson, Agro Zaffiro LLP;
Kristina Hyland, SimpsonWigle Law LLP;
John Krawchenko, J. Krawchenko Professional Corp.;
Catherine Olsiak, SimpsonWigle Law LLP;
Liza Sheard, Evans Sweeny Bordin LLP;
Sandra Stephenson, Lazier Hickey LLP



accredited
CPD

For Experienced Members, this program qualifies for **3 Substantive hours** and has been accredited by the Law Society for **1 additional Professionalism hour.**

For New Members, this program has been accredited by the Law Society for **4 New Member CPD hours.**

TOPICS

Passing of Estate/POA Accounts: Preparation of Accounts

Presented by: **Sandra Stephenson**, *Lazier Hickey LLP*

- Capital versus income
- What does the investment account look like and how to show it in the Estate/POA accounts?
- Cash accounting versus accrual accounting
- When can you use your own (informal) format and when do you need to use the traditional court passing format?
- What back-up documentation do you need to keep and produce?
- How to treat specific assets: DRIP; stock portfolio accounts; stock/dividend splits
- Preparing estate accounts using "Estateabase" software
- Calculating compensation if the estate trustee is also the attorney for property

Contesting or Defending an Application to Pass Accounts – Procedure and Tips

Presented by: **Justin de Vries**, *de Vries Litigation*

- Request for increased costs
- What does the Children's Lawyer look for in accounting?
- Preparing for a Court hearing and presenting your case

Releasing Claims from Estate: Drafting Separation Agreements to Bulletproof Estate

Presented by: **Joanne F. Guarasci**, *Ross & McBride LLP*

- Sample clauses
- When do support obligations bind the estate?
- Obligations of the estate administration lawyer
- Typical errors of estate planners

Selected Estate Administration Issues

Presented by: **Catherine Olsiak**, *SimpsonWigle LLP* and **David Henderson**, *Agro Zaffiro LLP*

1. Avoiding Delays When Applying for a Certificate of Appointment
 - Common Errors with the Notice of Application
 - Holograph Will – Attesting to Handwriting
 - Dispensing with Bond Requirement
 - Will on Deposit
 - Typical omissions when Applying for a Certificate of Appointment with Limited Assets

2. Estate Valuation / Inventory of Assets

- Estate Administration Tax Act –
 - overview; obtaining refunds, deferral of payment; subsequent discovery of assets
 - amendments to the Act
- Addressing Joint Assets
- Practice Considerations

Estate Planning: Assets outside Canada

Presented by: **Adam Cappelli**, *Cambridge LLP*

- Real property located outside Canada and owned by Canadian Testator

Private Insurance for Estate Trustees

Presented by: **R. Scot Dalton**, *Estate Risk Protection Plan Inc.*

- Emerging risk areas for executors;
- New standards of accountability
- Insurance as a solution for the executor's personal liability
- Product relevance to the lawyer

Succession and Disaster Planning – Is your Estate in Order?

Presented by: **Alison Hurst**, *Law Society of Upper Canada* and **Dan Pinnington**, *LawPRO*

- The need to have a succession/disaster plan
- Special clauses you need in your will and power of attorney
- Run-Off insurance coverage for Lawyers' estates

So You Would Like to Retire – Who Will Manage your Wills Portfolio?

Presented by: **John Krawchenko**, *J. Krawchenko Professional Corp.* and **Mary Lou Dingle**

- Run off coverage: when death is not enough
- Are you insured if you are an estate trustee?

Panel Discussion

- **How to Handle Offshore Money Undisclosed by Testator**
Presented by: **Nick Mastroluisi**, *Pettinelli Mastroluisi LLP*
- **Estate Freezes Post-Death**
Presented by: **Nick Mastroluisi**, *Pettinelli Mastroluisi LLP*
- **Drafting Errors – Double Legacies**
Presented by: **Alyson Sweetlove**, *Ross & McBride LLP*
- **LawPRO Topic: Know Your Client**
Presented by: **Liza Sheard**, *Evans Sweeny Bordin LLP*

Question & Answer Period



REGISTRATION FORM

Registration fees (includes materials and refreshments):

HLA Members	\$200.00	13% HST included in all fees
Non-member Lawyers	\$240.00	(HST Registration #R122908171)
Articling Students	\$150.00	

Please register me for the **10th Annual Estates & Trusts Seminar** to be held on Thursday February 16th, 2012.

I enclose a cheque for \$_____ payable to the Hamilton Law Association, or I authorize the amount of \$_____ to be charged to my MasterCard or VISA. Please circle card type: MasterCard / VISA.

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Send to: Attn.: Riane Leonard The Hamilton Law Association Fax: (905) 572-1188
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Refund Policy: Registration fee less 25% plus GST is refundable if cancellation is received at least FIVE working days before the program.

Jan. 31/12

“Need a price break? If so, please contact HLA Executive Director Rebecca Bentham at 905-522-7992.”