



The Hamilton Law Association presents...

# THE 16<sup>th</sup> ANNUAL ESTATES & TRUSTS SEMINAR

Thursday, February 8<sup>th</sup>, 2018  
1:00 p.m. to 4:30 p.m.

Sheraton Hamilton Hotel. Grand Ballroom  
(116 King Street West, Hamilton)

*Committee:* **John Krawchenko**, J. Krawchenko Professional Corporation / **Catherine Olsiak**, SimpsonWigle LAW LLP  
**David Henderson**, Agro Zaffiro LLP / **Alyson Sweetlove**, George Street Law Group LLP

## TOPICS

### Lunch & Registration (12:30pm - 1:00pm)

### Tax Update (1:10pm - 1:35pm)

Presented by: **Michael Morgan**, Ross & McBride LLP

### Beneficiary Designations and Minors (1:35pm - 1:55pm)

Presented by: **Susan Stamm** & **Kiran Arora**, Counsel, Property Rights,  
Office of the Children's Lawyer

- When is a Guardian of Property Required
- Common Issues arising from Separation Agreements

### Family Law Aspects of Estate Planning & Administration (1:55pm - 2:15pm)

Presented by: **Alyson Sweetlove**, George Street Law Group &  
**Jennifer Cooper**, Hughes & Bale LLP

- Terms of the Separation Agreement: Things to consider when drafting
- Dealing with gifts in a lifetime

### Mutual Wills vs. Mirror Image Wills (2:15pm - 2:30pm)

Presented by: **Catherine Olsiak** & **Angela Papalia**, SimpsonWigle Law LLP

### Special Fees (3:00pm - 3:20pm)

Presented by: **Heather Carol McKinnon**, Nolan Ciarlo LLP &  
**David Henderson**, Agro Zaffiro LLP

- When is it warranted to go above normal percentages?
- Cross-over when acting as Power of Attorney & Executor
- Compensation for Personal Care
- Contested Passing of Accounts

### Non-Billable Practices Panel: Keeping Your Accounts in Check (3:20pm - 4:20pm)

Presented by: **Nick Mastroluisi**, Pettinelli Mastroluisi LLP  
**John Krawchenko**, Krawchenko Law  
**Susan Brown**, Ross & McBride LLP

- Work In Progress (WIP)
- Retainers & Collecting
- Billing out Clerk Time
- Assessing your Accounts



### TOTAL 3.5 HOURS

This program contains  
**1.0 Professionalism  
Hour** and is eligible for  
up to **2.5 Substantive  
Hours**

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## REGISTRATION FORM

<b>Registration fees (includes materials, lunch &amp; refreshments):</b>	<b>Price HST incl.</b>
HLA Members	<b>\$252.00</b>
Non-Member Lawyers & Other Professionals	<b>\$305.00</b>
Articling Students, LPP Candidates, Non-Practicing Members & Paralegals	<b>\$190.00</b>
Law Firm Staff & Clerks	<b>\$120.00</b>

### Need a price break?\*

If so, please contact HLA Executive  
Director Rebecca Bentham at  
905-522-7992.

\*only current HLA members eligible.

**13% HST included in all fees**  
(HST Registration #R122908171)

Please register me for the 16<sup>th</sup> Annual Estates & Trusts Seminar to be held on Thursday, February 8<sup>th</sup>, 2018

Name: \_\_\_\_\_ Firm: \_\_\_\_\_ City: \_\_\_\_\_

E-Mail: \_\_\_\_\_ Call Year: \_\_\_\_\_

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Send to: The Hamilton Law Association, 500 - 45 Main Street East, Hamilton, ON L8N 2B7

Attn: **Kristjana Frani** Telephone: 905-522-1563 ext. 233 Fax: 905-572-1188 E-mail: [kfrani@hamiltonlaw.on.ca](mailto:kfrani@hamiltonlaw.on.ca)

Refund Policy: Registration fee less 25% plus HST is refundable if cancellation is received at least FIVE working days before the program.