



The Hamilton Law Association presents...

THE 16th ANNUAL ESTATES & TRUSTS SEMINAR

Thursday, February 8th, 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

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

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 16th Annual Estates & Trusts Seminar to be held on Thursday, February 8th, 2018

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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

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