Back to Basics: Pointing you in the right direction

The Hamilton Law Association Library’s
Guide to Wills, Estates & Trusts Resources

Presented by Kirsten Clement, Law Librarian
15th Annual Estates & Trusts Seminar
February 9, 2017
Print Resources: A Primer

• Find print resources in any Ontario courthouse library collection by using the online Advocat catalogue
• Search by title, author, keyword, etc.
• Use filters to limit to a specific courthouse library (such as Hamilton) or view all holdings
• The KF number for an item will help you find it on the shelves. Need help? Just ask!
• If you are in search of an item not owned by the HLA, we can interlibrary loan it for you at no cost
Searching Advocat

http://lsuc-voyager.hosted.exlibrisgroup.com/vwebv/searchBasic

Choose your search strategy

Limit to Hamilton or search all Ontario courthouse libraries

Location: Hamilton Stacks
Call Number: KF 778 J466 2006
Status: Available
Print Resources: Core and Essential Lists

• The Ontario Courthouse Library Association, in conjunction with LibraryCo, has established a ‘core list’ of key titles in each practice area which every Ontario courthouse library should have, and an ‘essential list’ of additional important titles which Area and Regional courthouse libraries (including Hamilton) should include in their collection.

• The HLA library meets both of these sets of collection standards in all practice areas including wills, estates and trusts law.
Core List Titles

• Macdonell, Sheard and Hull on Probate Practice (Hull) - KF 765 M325
• Preparation of Wills and Powers of Attorney (MacGregor) - KF 755 M32
• Waters' Law of Trusts in Canada (Waters) - KF 730 W28
• Powers of Attorney & Capacity: Practice & Procedure (Sweatman) - KF 1347 S94
• The Executor's Handbook (Greenan) - KF 778 G74
Essential List Titles

- Feeney's Canadian Law of Wills (MacKenzie) - KF 755 F43
- Practitioner's Guide to Estate Practice in Ontario (Rintoul) - KF 778 R56
- Estate Planning Handbook (Allen) - KF 750 A74
- Estate Planner's Handbook (Spenceley) - KF 750 S639
- Compensation and Duties of Estate Trustees, Guardians and Attorneys (Jenkins & Scott) - KF 778 J465
- Ontario Estate Administration (Rintoul) - KF 778 R567
- Law of Dependants' Relief in Canada (Harvey) - KF 760 F2 H37
Print Resources: What’s New?

• The HLA library’s newly acquired print resources in wills, estates and trusts law include:
  • 14th Annual Estates and Trusts Seminar (HLA)
  • Wills and Estates Practice Basics 2016 (LSUC)
  • Six-Minute Estates Lawyer 2016 (LSUC)
  • Practice Gems: The Administration of Estates 2016 (LSUC)
  • 11th Annual Wills, Estates and Trusts Conference (MLA)
  • Practitioner’s Guide to Estate Practice in Ontario (Fleming)
  • 19th Annual Estates and Trusts Summit (LSUC)
  • Estate Procedures Manual (Ministry of the Attorney General)
  • Kissing Cousins: Where Family Law and Trusts & Estates Law Meet (OBA)
  • New and Continuing Challenges in Trusts and Estates Law (OBA)
  • Drafting Trusts and Will Trusts in Canada 4th ed. (Kessler & Hunter)

• HLA print materials on wills, estates and trusts law can be found in the KF 720-780 call number range
Secondary Sources on Quicklaw

• Quicklaw, the go-to source for case law, also has a number of useful secondary sources which you can browse by practice area. In the area of wills, trusts, and estates, sources include Halsbury’s Laws of Canada, Canada Wills, Estates and Trusts Law Digest, Canadian Estate Administration, Drafting Trusts and Will Trusts in Canada, Feeney’s Canadian Law of Wills, and more!

• *Demonstration to follow*
Lexis Practice Advisor

- Practice Advisor is suite of 8 practice area modules, written and updated by leading experts in their fields, designed to provide practical wisdom and guidance to lawyers through practice notes, forms and precedents, legislation, checklists, charts, and more. One of these modules is exclusively for wills, estates and trusts law.

- Practice Advisor is a subscription resource available on HLA Library computers

  *Demonstration to follow*
Web resources: Infolocate

• Infolocate is an online database of full-text LSUC CPD material from 2004 to 18 months before present
• Choose “Access CLE” in the right hand drop-down menu to ensure you are searching CPD materials
• CPD materials are available in pdf format and can be downloaded, emailed, or exported to various citation applications such as Refworks and Endnote
• *Demonstration to follow*
Web resources: LSUC Practice Area Resources

• This set of online resources on the Law Society’s website is aimed at providing step-by-step how-to tips for lawyers on important tasks or topics within their practice area
• https://www.lsuc.on.ca/for-lawyers/resources-for-lawyers
  • Follow trail: Manage Your Practice > Practice Area Resources
• *Demonstration to follow*
Library staff are here to help!

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Thank you!
Quicklaw: Finding Secondary Sources

Browse sources by practice area

- All Sources
- By Category
- By Jurisdiction
- By Practice Area
  - Limitation of Actions
  - Maritime and Admiralty Law
  - Media and Communications Law
  - Municipal Law
  - Natural Resources Law
  - Pensions & Benefits Law
  - Professional Responsibility
  - Real Property Law
  - Securities Regulation
  - Sports and Entertainment Law
  - Statutory Interpretation
  - Tax Law
  - Torts
  - Transportation Law
  - Wills, Estates and Trusts Law
  - Workplace Health, Safety and Compensation Law
Quicklaw: Secondary Sources

See the scope of each source at a glance or click on the table of contents to drill down to specific sections. You can also use the drop down arrow to add the source as a search filter.
Practice Advisor
The tools in this toolkit are organized under tabs.