



The Hamilton Law Association presents...

THE 12th ANNUAL ESTATES & TRUSTS SEMINAR

THURSDAY, FEBRUARY 13th, 2014 - 1:00 p.m. to 5:00 p.m.

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

TOPICS



The Lawyer as Witness in a Will Challenge and as Defendant in the Solicitor's Negligence Action

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

- Mock cross-examination of a lawyer as a witness in a Will challenge
- Mock cross-examination of a lawyer as defendant in a Will challenge
- Panel discussion on issues raised in cross-examinations
- What to do if you are sued?
- How to keep from being sued?
- How to protect yourself when called as a witness in a Will challenge?

This program contains **1.25 Professionalism Hours**. This program is also eligible for up to **2.75 Substantive Hours**.

This organization has been approved as an Accredited Provider of Professionalism Content by the Law Society of Upper Canada

Inter Vivos and Family Trust: The Basics and Beyond

Presented by: **David Mifsud**, *Ross & McBride LLP* and **John Grummett**, *Taylor Leibow LLP*

- Trusts defined
- Drafting issues
- Using the trust: advising the trustees
- Advising a third party: a bank/lender
- Accounting issues
- Attribution rules

The Roles of the Office of the Public Guardian and Trustee (PGT) and the Office of the Children's Lawyer (OCL) in Estate Administration

Presented by: **Laurie Redden**, *Deputy Public Guardian & Trustee/General Counsel, Office of the Public Guardian and Trustee* and **Susan Stamm**, *Counsel, Property Rights, Office of the Children's Lawyer*.

Application for a Certificate of Appointment

- When do you serve the PGT and the OCL?
- Dealing with Unascertained Beneficiaries – who do you serve and why?

Notification to PGT and OCL when Administration of Estate does not Necessitate Obtaining a Certificate of Appointment of Estate Trustees

Distribution of Estate

- Devise of real estate to minor (OCL)
- Transferring assets, including real estate, to incapable person (PGT)
- Obtaining releases (OCL and PGT)
- Passing of Accounts – Under what circumstances is it an absolute requirement?

Will Drafting

Drafting Considerations: Using Multiple Wills

Presented by: **David Henderson**, *Agro Zaffiro LLP*

Drafting Considerations: Addressing International Wills and Assets

Presented by: **Andrew Brown**, *Andrew R. Brown Professional Corporation*

Committee: **David Henderson**, *Agro Zaffiro LLP* / **John Krawchenko**, *J. Krawchenko Professional Corporation* / **Catherine Olsiak**, *SimpsonWigle LAW LLP* / **Liza Sheard**, *Evans Sweeny Bordin LLP* / **Sandra Stephenson**, *Evans Sweeny Bordin LLP*

Thank you to our sponsors:



REGISTRATION FORM

Registration fees (includes materials and refreshments):

HLA Members	\$209.00	13% HST included in all fees (HST Registration #R122908171)
Non-Member Lawyers	\$245.00	
Articling Students & Non-Practicing Members	\$158.00	

Need a price break?*

If so, please contact HLA Executive Director Rebecca Bentham at 905-522-7992.
*only current HLA members eligible.

Please register me for the **12th Annual Estates & Trusts Seminar** to be held on Thursday February 13th, 2014.

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**, Hamilton Law Association, 500 - 45 Main Street East, Hamilton, ON L8N 2B7

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

Feb 5/14