Learn to expertly meet the needs of your unique clients!

Estate Planning for Blended Families

with Rachel Blumenfeld & Marni Pernica

Thursday, July 18, 2019

Live webinar with chat

includes 60 day replay*

9:00 am – 10:30 am (Pacific)
10:00 am – 11:30 am (Mountain)
11:00 am – 12:30 pm (Central)
12:00 pm – 1:30 pm (Eastern)
1:00 pm – 2:30 pm (Atlantic)
1:30 pm – 3:00 pm (Newfoundland)

**This program features real-time audio of the presenter with synchronized presentation slides, and a chat feature that allows for live Q & A. SK attendees please verify whether you align with Central (MB) or Mountain (AB) time based on season and location.*

WHO SHOULD ATTEND

This program is designed for lawyers practicing in the area of wills, estates, and trusts. It may also be of interest to tax law and family law lawyers, and general practitioners.

ABOUT THE PROGRAM

Blended families have come a long way since the Brady Bunch of the 1970's. Today's second (or third or fourth) marriages raise complex legal, financial and practical issues for families - and for their lawyers! Balancing the interests of the surviving spouse with those of children from prior marriages can be challenging for even the most experienced practitioner. Do you have the skills you need to meet the needs of this growing client base? This convenient, 90 minute webinar with experienced Toronto estates lawyers Rachel Blumenfeld and Marni Pernica will examine essential estate-planning tools lawyers can use to minimize disputes and protect the interests of all involved. After taking this course you will:

- be more alert to sources of conflict in blended families
- understand important considerations when acting for blended families
- understand the benefits and risks of various planning tools
- enhance your knowledge of the tax regime as it applies to estates and trusts

Don't miss this opportunity to get practical advice on the specific planning needs of blended families, and key do's and don'ts to avoid undesired consequences and make sure your client's wishes are respected.

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introduction

Family Dynamics and Estate Planning in Blended Families

Pitfalls of Jointly-held Assets

Step-children and "Step" Grandchildren: Are They Part of the Plan?

Marriage Contracts and Other Family Law Considerations

Legal Structure versus Practical Reality

Use of Spousal Trusts with Blended Families

Principal Residence Exemption Rules and the Effects on Estate Planning in Blended Families

Program Wrap-up and Evaluation

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Meet your Presenter, Rachel Blumenfeld

Rachel Blumenfeld is a partner with Aird & Berlis LLP (Toronto), and a member of the firm's Estates & Trusts, and Tax Groups. Her practice focuses on trusts and estates, personal tax planning, charities and not-for-profit law. She advises clients on tax, trusts, estate planning & administration, preparation of wills, power of attorney documents, business succession, and insurance planning. Rachel holds the Trust and Estate Practitioner (TEP) designation and is recognized by Chambers & Partners, Best Lawyers, Who's Who Legal, Expert Guides and Lexpert® as a leader in her field. She is a long time member and current National Director of STEP Canada. Rachel frequently writes and speaks for legal and other audiences on topics involving tax and estate planning, life insurance, and business succession planning and charitable giving.

Meet Your Presenter, Marni Pernica

Marni Pernica is a partner with Aird & Berlis LLP (Toronto), practicing in the firm's Tax Group, and Estates & Trusts Group. Her practice focuses on wills, trusts, estate administration, succession planning, estate and tax litigation, and related areas of tax law. Marni is a member of the OBA Trusts and Estates Section Executive, the Canadian Tax Foundation, and the Society of Trust and Estate Practitioners (STEP). Marni is co-author with Clare Sullivan of "Trusts and Trustees," *Key Developments in Estates and Trusts Law in Ontario*, 2014/2015 Edition Canada Law Book, and is a frequent writer for legal and tax publications on estates-related topics, including as a regular contributor to *The Bottom Line*. She also speaks to lawyers and other professionals on estates-related topics.

BC: *This program has been approved for 1.5 CPD hours.* **ON:** *This program contains 1.5 Substantive hours.*
SK: *CPD application is pending.* **NB**: *CPD application is pending.*
Lawyers in other mandatory CPD jurisdictions may count their attendance towards their CPD requirement/plan.

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√ Yes, I want to attend Estate Planning for Blended Families

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* Materials will be distributed electronically in advance. Live webinars feature real-time audio of the presenter with synchronized presentation slides, and a chat feature that allows for live questions and verbal responses by the presenter. The recording of the webinar is available for 60 days.

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□ After June 20, 2019: $165.00 + $21.45 (13%) HST* = $186.45

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