



## *Avoid probate without creating litigation!*



# Jointing Assets to Avoid Probate: Risks and Best Practices

*with Lynne Butler*

**Thursday, March 5, 2026**

**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 video 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

Attend this program if your practice includes estate planning, administration or litigation.

## ABOUT THE PROGRAM

Jointing assets is a common estate planning strategy to try to avoid probate and simplify estate administration. In practice, however, joint ownership often creates confusion, unexpected tax consequences, and, in many cases, estate litigation. This program takes a practical look at when jointing assets works, when it doesn't, and how you can reduce the risk of future disputes. Experienced estates practitioner Lynne Butler focuses on joint bank accounts, investment accounts, and jointly held real property. You will learn how to: assess when joint ownership is appropriate, identify red flags relating to intention, capacity, and family dynamics, and document joint ownership properly to reduce the likelihood of disputes after death. By the end of the webinar, you will better understand:

- Common myths about joint ownership
- How joint assets can lead to estate litigation
- Steps you can take to reduce litigation risk

This program is designed for estate planners and estate litigators alike, with a focus on preventing disputes.

## SCHEDULE (Eastern)

**12:00 pm - 1:30 pm**

### Welcome and Introduction

### Jointing Assets to Avoid Probate: The Basics

- Reasons for joint ownership
- Assets commonly jointed
- When probate avoidance is realistic

### Common Problems with Joint Ownership

- Unclear intention
- Family conflict
- Capacity and undue influence issues
- Tax and fairness concerns

### When Joint Ownership Is Challenged

- Resulting trust claims
- Disappointed beneficiaries
- Allegations of misuse of powers of attorney
- Capacity challenges

### Best Practices

- Key questions to ask
- Documenting intention properly
- When to recommend a different approach

### Program Wrap-up and Evaluation

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## PRAISE FOR LYNNE BUTLER

*"Super practical. I learned a lot."*

*"Lynne is an excellent presenter - well organized, thorough and very practical. Appreciated all the personal examples and explanations she shared."*

*"Lynne is my absolute favourite presenter! Fun, down to earth and I always learn something new."*

*"Very pertinent and dense learning. Well organized and the right length. Excellent summary slides."*

*"I stayed engaged the entire time. Appreciated use of actual cases. It makes the content more relevant."*



**ON:** This program contains 1.0 Substantive hour and 0.5 Professionalism hours.

**BC:** This program has been approved for 1.5 CPD hours, including 0.5 hours of professional responsibility and ethics, client care and relations, and/or practice management.

**SK:** This program qualifies for 1.5 CPD hours (0.5 of which qualify as ethics hours) under the Law Society of SK CPD Policy. Lawyers in other mandatory CPD jurisdictions may count their attendance towards their CPD requirement/plan.

Seminar Partners is an Accredited Provider of Professionalism Content by the Law Society of Ontario and a pre-approved CPD Provider of the Law Society of British Columbia.

## MEET YOUR PRESENTER



**Lynne Butler** is a lawyer, mediator, and writer. She graduated from UBC Law School and was called to the Bar in Alberta in 1986. After more than 20 years, thousands of wills drawn and hundreds of estates probated, Lynne joined the estates

department of a leading trust company for a further seven years. She now practises law in her home province of Newfoundland and Labrador, working exclusively in wills, estates, probate, elder law, and trusts. Lynne has been interviewed by Global TV, BNN, CBC Radio, the *Wall Street Journal*, the *Globe & Mail*, the *Vancouver Province*, the *Edmonton Journal*, the *Toronto Star* and the *Montreal Gazette*, among other media. She is the former co-host of The Law Show and is the author of ten books about estate planning. She was the reviewer for Newfoundland and Labrador for LexisNexis *Drafting Wills in Canada: A Lawyer's Practical Guide*, 3rd Edition. She has chaired the Wills and Estates Section of the Newfoundland and Labrador Bar Admissions Course since 2019.

### ✓ Yes, Jointing Assets to Avoid Probate: Risks and Best Practices, with Lynne Butler

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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.

#### REGISTRATION FEE:

- ☐ **On or before February 27, 2026: \$150.00 + \$19.50 (13%) HST\* = \$169.50 - Save \$25.00 + tax!**  
☐ **After February 27, 2026: \$175.00 + \$22.75 (13%) HST\* = \$197.75**

\*With ON HST. Please adjust tax for attendee's province as follows: 5% in AB, BC, MB, NWT, NU, SK, YK. 13% in ON. 14% in NS. 15% in NB, PEI & NL.

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