



*Simple strategies  
to help your client  
stay out of court!*



# Advising the Estate Executor/ Trustee: How to Do It Right

*with Lynne Butler*

**Thursday, February 4, 2021**  
**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 new to wills and estates law, or who are planning to add the areas of wills, trusts and estates to their existing practice.

## **ABOUT THE PROGRAM**

Do you understand the fundamentals and scope of Executor responsibility? Are you aware of the most common pitfalls practitioners face when advising an estate Executor or Trustee? This highly practical presentation with experienced estates and trusts lawyer Lynne Butler will review the responsibilities, powers, and liabilities of Executors, and the rights of beneficiaries, with a focus on how counsel for the Executor can help avoid conflict and litigation! Among the subjects Lynne will address are:

- How does a lawyer work with co-Executors who can't get along?
- How can an Executor defend against an accusation of breach of trust?
- What does the court consider in an application to remove an Executor?
- What happens if an Executor overpays a beneficiary?
- Is there a right to an interim distribution?
- Can Executors demand releases from beneficiaries before paying them their inheritance?
- What do you do if your client behaves unethically?

In addition, Lynne will offer suggestions for working with a trust company Executor, dealing with “rogue” Executors, and, resolving disputes about Executor’s fees. Attend this webinar and enhance your skills to help the Executor client avoid common missteps!

## **SCHEDULE (Eastern)**

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

### **Welcome and Introduction**

#### **The role of the Executor in the estate**

- Core duties, responsibilities and powers of Executors
- Key rights of beneficiaries
- Executor liability

#### **Strategies for representing the fiduciary**

- The lawyer-Executor relationship
- Sources of confusion and conflict between Executors and beneficiaries
- Strategies for avoiding conflict and litigation
- Executor protection

#### **Practical ethical considerations**

#### **Program Wrap-up and Evaluation**

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## PRAISE FOR LYNNE BUTLER

- “Fantastic job breaking difficult information down into digestible chunks that are very easy to absorb.”
- “A great help in an estate case that I am involved in. Thank you for the terrific information.”
- “Excellent insights with a no-nonsense approach.”
- “Wonderful. Lynne’s light tone makes serious and often scary issues seem non-threatening and possible to work through.”
- “Great presentation. Lynne’s expertise, integrity and experience were clearly evident.”
- “Information provided was superb and helped to answer a lot of questions that I have!”



**BC:** This program has been approved for 1.5 CPD hours.

**ON:** This program contains 1.5 Substantive hours.

**SK:** This program has been approved for 1.5 CPD hours.

**NB:** CPD application is pending.

Lawyers in other mandatory CPD jurisdictions may count their attendance towards their CPD requirement/plan.

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## 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, trusts, and related matters. Lynne has appeared on, or been interviewed by CPAC, CityTV, Global TV, BNN, CBC Radio, the *Wall Street Journal*, the *Globe and Mail*, the *Vancouver Province*, the *Edmonton Journal*, the *Toronto Star*, the *Montreal Gazette*, *Canadian Lawyer*, and *Maclean's Magazine*, among other publications. She is the former co-host of *The Law Show*, and is the author of ten books about estate planning, including “How Executors Avoid Personal Liability”.

✓ **Yes, I want to attend Advising the Estate Executor/Trustee: How to Do It Right**

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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 January 15, 2021: \$140.00 + \$18.20 (13%) HST\* = \$158.20 - Save \$25.00!**
- **After January 15, 2021: \$165.00 + \$21.45 (13%) HST\* = \$186.45**

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

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