



*Anticipate & deter
challenges to your
client's estate plan!*



Avoiding Challenges to Testamentary Documents

with Lynne Butler

Thursday, July 13, 2023

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 will be of interest to lawyers practicing in the areas of wills and estates, including drafting and litigation counsel.

ABOUT THE PROGRAM

Challenges to testamentary documents can be time-consuming and costly to resolve, reducing the value of the estate and proving heartbreaking for everyone involved. While litigation cannot be completely avoided, there are simple client counselling and drafting tools that estate planners can use to reduce the likelihood of a will contest and ensure the testator's intentions are successfully carried out. This program, with experienced estates lawyer Lynne Butler, will review steps to take, and avoid, during the planning and drafting stages of testamentary documents that will help safeguard your client's wishes and minimize later litigation risk. From the first meeting to final document execution, Lynne will discuss the risks inherent in estate planning transactions and share reminders of how even the most basic practices, when not followed properly, can undo a well-designed estate plan. Topics will include commonly litigated issues in will contests, recognizing high risk situations for conflicts, preventative measures to avoid disputes, and drafting documents where a challenge is expected. By anticipating possible areas of challenge and using proactive drafting and defensive documentation techniques, you can help your clients create valid, effective testamentary documents that discourage disputes and ensure their estate plan remains intact. Don't miss this opportunity to learn how to prevent challenges to testamentary documents!

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introduction

Essential Elements Required for Creating a Valid Testamentary Document

Grounds for Challenging Testamentary Documents

Spotting High Risk Situations for Challenges

Practical Steps to Avoid Challenges

Drafting Strategies to Prevent Challenges and Improve Validity of Testamentary Documents

Issues around Holographic and Remote Wills

Program Wrap-up and Evaluation

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PRAISE FOR LYNNE BUTLER

"Super practical. I learned a lot."

"Excellent presenter - well organized, thorough and very practical. Appreciated all the personal examples and explanations she shared."

"Liked getting the slides and sample letters. Always nice to have examples from good lawyers."

"Very informative, polished presentation. Top marks all around."

"I've been doing wills work for 5 years and found everything useful. Would definitely recommend."



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 has been approved for 1.5 CPD hours, 0.5 hours of which qualifies as ethics.

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, I want to attend **Avoiding Challenges to Testamentary Documents**

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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 June 23, 2023: \$140.00 + \$18.20 (13%) HST* = \$158.20 - **Save \$25.00!**

After June 23, 2023: \$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.

Register online: <http://seminarpartners.ca/register-for-courses/>

Register by mail, fax or phone: Return this form with payment to Jennifer Snoyer, Finance and Communications Coordinator, Seminar Partners, 2300 Yonge Street, Suite 1600, Toronto, ON M4P 1E4 Tel. 1.866.606.4212 or 647.352.8633 Fax 416.549.1619. Email: jennifer@seminarpartners.ca. Registration fee is refundable less \$50 admin fee if written cancellation received 10 working days before the program. No refunds will be made after the cancellation date. Program content, speakers and location may change without notice. See our website for all policies. In the event of program cancellation, our liability is limited to refund of registration fees. GST/HST #848208492

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